



教育統籌局

Education and Manpower Bureau

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

**Enhancing School Development and Accountability  
through Self-evaluation and External Review:  
Modification of Implementation Requirements**

I am writing to update our progress following the introduction of the enhanced school development and accountability (SDA) processes during the past 12 months and, to outline some modifications in its implementation in response to expressed concerns of the school sector.

*Progress to date*

Lessons learnt from education reforms around the world have at least one common feature - shared understanding of reform goals and initiatives is fundamental to genuine educational change and improvement in learning outcomes. To generate this shared understanding, we need an ever-growing partnership and professional dialogue between the central administration, the school sector and members of the education profession.

We are pleased to see that the partnership we aim to establish with schools for the enhancement of SDA is taking shape. We have to thank the 100-plus schools which have taken part in the initial phase of external school review (ESR) and the preceding pilot

exercise. Their pioneering efforts in doing systematic and rigorous school self-evaluation (SSE) and evidence-based school self-assessment (SSA) in preparation for ESR have provided a solid foundation for further improvement of learning and teaching in the classroom. The use of intelligent information based on the school development data is the foundation for school improvement. We have been able to identify good practices in strategic and action planning which results in clear development priorities and well-conceived implementation plans coupled with effective mechanisms for formative evaluation of school work. The actual impact on school development observed is promising and the achievements made by the schools concerned are worth celebrating. Without the commitment of our frontline partners, we would not have witnessed such positive school development.

However, despite these successes, we acknowledge there has been considerable disquiet and concern about some elements of the framework and the implementation processes. These include the workload resulting from SSE and SSA in preparation for ESR, the collectibility, reporting and transparency of key performance measures (KPM), the reporting requirements of SSA, and the uploading of ESR reports on the web.

At the outset, we have intended the SDA Framework to be developmental and improvement-oriented. We have always expected that the actual experience of schools in the processes should provide quality feedback on any necessary changes to be made so that better outcomes for schools would result. We are pleased to know that schools support the conceptual basis of SDA and its developmental orientation.

To sustain our partnership with schools and to improve our learning community by evaluation and support, we are determined to take appropriate actions to address some of the expressed concerns.

### *Proposed modifications*

Issues have been raised about KPM including

collectibility, frequency of collection and the level of transparency for KPM and other related ESR processes. The following paragraphs outline the measures that will be taken in response to these concerns while abiding by the underlying principles.

*Principle #1:* The data collected must satisfy the criterion of usefulness for school improvement and their collection should not generate excessive workload.

We will have a review of all the KPM in the light of issues raised. At this point of time, we have agreed that EMB will not collect data on continuous professional development (CPD) for teachers since the CPD framework is in its initial 3-year trial period.

*Principle #2:* Schools should collect and analyze sufficient data to be able to make a meaningful assessment of their own strengths and suggested areas for improvement.

In accordance with this guiding principle, we would expect schools to have completed at least one collection of all KPM in preparation for their first timetabled ESR. In this context, schools should decide on the frequency of data collection and are not obliged to conduct stakeholder surveys annually.

*Principle #3:* There should be transparency, sharing and discussion of all available evidence on school performance at the School Management Committee (SMC) and amongst teachers and parents.

We recognize there is a great deal of concern about the need to publish KPM on the school website. Our intention is that transparency can increase naturally over time, when there is greater understanding of what the data might mean and when there is balanced and comprehensive data available, to avoid possible misinterpretation and misuse. We have therefore decided that only the key stakeholders in the school need to be informed of the school performance in KPM. In the same vein, the SSA report will not be required to be placed on the school web.

Consistent with QAI processes, the ESR Reports will be uploaded on the EMB website for public access. However, for the first 100 schools, ESR Reports will not be uploaded before the fourth quarter of 2004 to allow time for further standardization to be undertaken. In particular, Reports will not contain commentary on any discrepancy between the SSA results and the conclusions of the ESR team and the format will be refined to better support school development.

I would like to take this opportunity to reinforce our protocols established in EMB Circular Memorandum No. 269/2003: if schools choose to report certain KPM information in the school report to be posted 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 Hong Kong Attainment Test (HKAT), Territory-wide System Assessment (BCA) and value-added data are not for publication on the school web.

### *The way forward*

In order for all involved to have a better understanding of the implementation requirements, we will hold a series of sharing sessions on good practices in SSE and SSA and in management of school data for school development in the coming school year. We will provide further support in the way of web-based tools to assist in the efficiency of data collection so that due emphasis can be placed on analysis and professional discussion. In addition, the first reference points for KPM will be made available to schools in November 2004. We believe this feedback to schools will be very valuable and give extra impetus to SSE.

Apart from the above, a review of the processes and outcomes of the first 100 ESR conducted to consolidate our experiences gained so far is underway and will be concluded over summer. The review will cover issues such as the selection, collection and reporting of KPM, preparation of SSA and the uploading of ESR Reports. It will also look into the difficulties encountered in a small number of cases where excessive

documentation has placed unnecessary workload on school communities.

In the light of this process, the timetable for ESR for the 2004/05 school year will not be finalised until the findings are known and the ensuing consultation is completed. We wish to use the fourth quarter of 2004 to ensure all our schools have opportunity to share the findings. There will not be any ESR scheduled for the fourth quarter of 2004. After the review, ESR will be resumed and schools will be advised of any further revised arrangements in this regard by December this year.

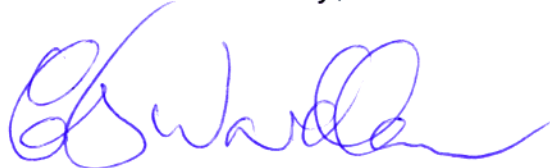
You will find all the details in a Circular Memorandum to be issued by the end of this week. We hope that our proactive actions will forge a stronger partnership with schools and create more space for school development.

The outcomes we seek from the SDA processes are that rich evidence is progressively available; the community knows more about its schools; there is feedback into the policy and priority setting; and external professional input to support schools is timely and can add value. In this way, schools will be enabled to focus on improved learning of all their students.

I look forward to your continued support and feedback.

If you have any enquiries, please contact our colleagues in the Quality Assurance Division on 2126 5288.

Yours sincerely,



( Chris WARDLAW )  
for Secretary for Education and Manpower