

# CHANGING THE CURRICULUM

THE IMPACT OF REFORM ON PRIMARY SCHOOLING  
IN HONG KONG

*Edited by*

**Bob Adamson, Tammy Kwan and Ka-ki Chan**



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## About the Contributors

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**Bob Adamson** is an Associate Professor in the Department of Curriculum Studies at the University of Hong Kong. Since 1983, he has taught and published in the fields of higher education, English language teaching and teacher education in the People's Republic of China and Hong Kong. A consultant to the Ministry of Education in the PRC, he has worked on projects related to the national English Language curriculum in Chinese secondary schools. His books include *Higher Education in Post-Mao China* (with Michael Agelasto).

**Mei-lan Au** is an Assistant Professor in the Department of Education at the University of Hong Kong. Before joining the university, she had over ten years' experience in teaching children with special needs in mainstream primary and secondary schools, and special schools. She also has extensive experience in promoting parental involvement in education. Her research interests are in the area of special needs education and include curriculum development and evaluation, curriculum change, catering for individual differences, and parental involvement.

**Ka-ki Chan** was formerly an Associate Professor in the Department of Curriculum Studies at the University of Hong Kong, before becoming the Chief Executive of the Curriculum Development Institute, Education Department of the Hong Kong SAR government in September 1998. She has wide experience as a school teacher, curriculum developer, teacher educator, and researcher in curriculum change and evaluation. Her commitment to curriculum reform as a policy-maker in Hong Kong is inspired by the need for a synergy of theory and practice.

**Mary Man-wai Che** is currently working as a Senior Research Assistant on the English Language Benchmarking Project in the Faculty of Education at the Chinese University of Hong Kong, and as a Guest Lecturer in the Department of Educational Management and Professional Support at the Hong Kong Institute of Education. In 1991, she obtained her Master's degree in Psychology of Education from the University of London. She spent four years as a secondary school teacher of Chinese Language and Literature. Her research interests are in the field of task-based learning, catering for diversity, and psychology teaching and learning.

**Pui-man Chik** is a Research Assistant in the Department of Curriculum Studies at the University of Hong Kong. Since 1995, she has worked on projects related to language teaching and learning in Hong Kong primary schools. Her research area is the relationship between qualitative differences in teaching and learning language as school subjects.

**Po-yuk Ko** is a Teaching Consultant in the Department of Curriculum Studies at the University of Hong Kong. Since 1994, she has worked in teacher education, specializing in Chinese education. Her research interests include expert teachers in China, computer-assisted language learning and school curriculum development in Hong Kong. Her recent publications include *The Professional Development of an Expert Teacher in China* and *Children's Stroke Sequence Errors in Writing Chinese Characters* (with Nancy Law and others).

**Tammy Kwan** is an Associate Professor in geographical education in the Department of Curriculum Studies at the University of Hong Kong, which she first joined in 1983. During 1992–97, she was a Lecturer at the School of Professional Studies, Queensland University of Technology, responsible for social, geographical and environmental education. She has a strong commitment to action research as a means to improve teachers' professional development and personal growth.

**Mun-ling Lo** is an Assistant Professor in the Department of Curriculum Studies at the University of Hong Kong, where she has been a teacher educator since 1994. She has over fifteen years' teaching experience in secondary schools in Hong Kong and Australia, and is the co-author of Integrated Science and Chemistry textbooks used by many Hong Kong secondary schools. Formerly the course director of the refresher training courses for serving teachers in Hong Kong, she is now the Project Director of the Unified Professional Development Project, which is designed to enhance school-university partnerships. Her research interests include chemistry teacher education, curriculum reform and teachers' professional development.

**Ida Ah-chee Mok** is an Assistant Professor in the Department of Curriculum Studies at the University of Hong Kong. She graduated with a Bachelor's degree in Science in 1982 from the University of Hong Kong and began her career as a secondary school teacher. Since 1990, she has worked in teacher education, specializing in mathematics education. She gained her Ph.D. at the University of London in 1996. Her research specialism is students' mathematics learning. She is a co-author of *Polynomials and Equations* (with K.T. Leung and S.N. Suen) and the co-editor of *Hong Kong Mathematics Education Conference Collected Papers 95-97* (with C.I. Fung).

**Paul Morris** is Chair Professor in the Department of Curriculum Studies at the University of Hong Kong, and from August 2000 is working as Deputy Director (Academic) at the Hong Kong Institute of Education. He has published extensively on issues related to the school curriculum and educational policy in East Asia, and his most recent books include *The Hong Kong School Curriculum: Development, Issues and Policies* and *Teacher Education in the Asia-Pacific Region* (with J. Williamson). He was the Principal Investigator for the research projects on which this book is based.

**Dorothy Fung-ping Ng** was appointed as an Assistant Professor in Chinese Language in the Department of Curriculum Studies at the University of Hong Kong in September 1995. Formerly a Lecturer in the Institute of Language in Education in Hong Kong, she has fifteen years' experience in teacher training and education. Her teaching and research interests include Chinese linguistics, classroom language and action research in Chinese language teaching and learning.



**Annie Siu-yin Tong** is a Lecturer in the Department of English at the Hong Kong Institute of Education. She holds a Bachelor's degree from the University of Nottingham and a Master's degree from the City University of Hong Kong. Before joining the HKIEd in 1995, she worked as a secondary school teacher and an educational researcher on language development projects. Her research interests include the English language curriculum, teaching materials and pedagogy.

## Improving Schools in Hong Kong — Lessons from the Past

*Paul Morris, Mun-ling Lo and Bob Adamson*

### **INTRODUCTION**

This book has explored the impact of a systemic curriculum reform on schools, teachers and classrooms in Hong Kong. We have located our analysis in the international literature that relates to innovation and change, and our audience, so far, has primarily been our peers who are involved with analysing educational reforms. However, for two reasons, it would be unwise if we were to leave as implicit the lessons that could specifically be learnt in Hong Kong from the case of the Target Oriented Curriculum (TOC). Firstly, at this juncture of Hong Kong's history, educational reform generally and curriculum reform specifically have been placed at the forefront of the policy agenda as the government strives to improve the quality of schooling and re-create Hong Kong as both a part of China and a part of the global economy. Thus, for example, at the time of writing, the Education Commission was engaged in a major and ongoing comprehensive review of the overall educational system in Hong Kong (Education Commission 1999a and b). To date this has resulted in a new statement of educational aims and wide-ranging public consultations for the purpose of reforming the academic structure, the curriculum and

assessment mechanisms. Secondly, to leave the lessons of TOC for others to infer increases the potential for misinterpretation. Accordingly, our purpose in this chapter is to spell out concisely what we believe can be learnt about educational innovation and reform from the experiences of TOC. Sadly, much of our analysis suggests that policy-makers are only learning slowly and that many of the errors of the past are being revisited and that these are not unique to Hong Kong (Eisner 1992; Fullan and Miles 1995).

The lessons that can be learnt from the TOC experience can be broadly distinguished into those which seemed to contribute positively to change and are thus potentially worthy of emulation, and those which were more negative in their impact and are thus probably best avoided in future.

We saw in Chapter Two that the first phase of the TOC reform from 1991 to 1993 — which primarily involved the processes of policy-making and its dissemination — provides the source of most of the lessons of a more problematic and negative emphasis. In contrast, the later phases — which saw adjustments to the nature of the policy and its adaptation in schools — tend to provide those lessons of a more positive nature. In the following sections, we focus initially on the lessons that apply to the process of policy-making, and subsequently on those that relate to the operation of schools. Throughout, we draw comparisons with the ongoing process of reform of the educational system. A theme that runs through our analysis relates to the way reforms have been constructed upon a deficit or pathological model of teachers' pedagogy and schooling. We argue that this embodies a conception of how people learn and change which is both contrary to that promoted in pedagogical reforms and serves to undermine the professionalism of teachers on whom educational improvement is dependent.

## **LESSONS FOR POLICY-MAKING**

The first phase saw the introduction, promotion and operationalization of the reform in ways that served to exacerbate public concerns and encouraged resistance to change. Key features that were problematic and contributed to this scenario included:

- an initial low level of public participation and input from the professional community in the policy-making process;
- a failure of the policy to tackle fundamental structural features of schooling that were supportive of the maintenance of the status quo;
- a rationale for reform that was initially premised on an extensive

critique of teachers and schools, and only later, as intentions were translated into actions, stressed good practices rather than perceived deficiencies;

- a lack of continuity and development between the reform and previous initiatives, and an expectation of radical change within an unrealistically short time-scale;
- an initial reliance on rhetoric, and low levels of support for change in the form of teacher education and classroom resources;
- a lack of coherence and common purpose within the various branches of the government that were attempting to translate policy intentions into actions; and
- an initial focus on assessment, accountability and selection as the key elements of reform that was later replaced by a greater emphasis on teaching and learning styles.

The first two features are distinctive insofar as they have been avoided in the reform exercise initiated in 1999. One notable aspect of this exercise has been its extensive programme of public consultation, which has focused on the limitations of the current system and on the need for reform in general. There has also been a recognition that the success of curriculum reforms requires the understanding that existing structural features — especially those relating to the system of assessment and the organization of the school curriculum into a large number of discrete subjects — have served as barriers to curriculum improvement.

We elaborate below on the remaining five of the above features, which we feel are especially pertinent in that they seem to have a more enduring quality and characterize both the TOC and post-TOC attempts at reform. Our analysis is provisional as it was written prior to the completion of the ongoing reform exercise.

## **Critiquing Teachers and Schools**

The first and most problematic feature involves the tendency to locate the need and rationale for change on an intensive and extensive critique of existing practices in schools and classrooms. The construction of policy on a foundation of criticism is both understandable (in that reforms are competing for resources and for a place on the public policy agenda) and widespread (other reforms such as the Activity Approach and the School Management Initiative were similarly promoted). In the quest for resources and in order to obtain support for new policies, radical solutions are promoted by policy-makers that portray what is currently going on in

schools in ways that are highly critical of both the curriculum and teachers. In the case of TOC, this was done through a negative portrayal of current practices and by contrasting them to the radically improved nature of schooling *if* the reform were fully implemented. In the TOC policy documents, prevailing practice was described as: fragmented and overcrowded; lacking coherence; emphasizing rote memorization and the 'linear mastery of decontextualised skills'; lacking awareness of the role of language; lacking explicit information on 'what learning progress looks like'; embodying a view that pupils are imbued with a fixed quantity of intelligence; emphasizing summative assessment; and focusing on trivial information and on assessment.

*Improving the Quality of Learning* (Clark, Scarino and Brownell 1994, p. 14), which served as the foundation of the TOC initiative, also explains that:

... current educational practices in Hong Kong and elsewhere can be said to be based on the partial conception of learning set out by behaviourist psychologists. Their learning theory was based on studies of animal behaviour from which they generalised their findings to human learning.

Similarly, in the interviews given by policy-makers, there was constant use of terms such as *rote learning*, *teacher-centred*, *exam-centred* and *passive pupils* to both describe the problematic nature of the existing curriculum and justify the need for radical reform. In effect, what emerged was something akin to what Ball (1994, p. 19) terms, with reference to the UK government's portrayal of teachers, 'a discourse of derision' which served to demonize schools and teachers. But in Hong Kong the critique was directed more at styles of teaching and learning and was thus less of a direct critique of teachers than was the case in the UK. While this portrayal of current practice might have helped to gain acceptance of the reform in the public and policy arenas, it had the opposite effect in schools. The wholesale criticisms of teachers' competencies suggested that they lacked appropriate professional skills, that all of their current practices were problematic, and that they should radically change their behaviour. Consequently, the initial impact of the reform was to contribute to the de-skilling and deprofessionalization of many teachers. It also dealt a blow to those teachers who were innovative even before TOC, because they felt that their efforts were not recognized. By giving a new label to the pedagogy, everyone was expected to 'turn over a new leaf' before their contribution would be recognized. It also served to reinforce the level of opposition to the reform. In effect, the vision of the future underpinning

the reform was derived from a comparison of a negative and stereotyped portrayal of current practices with the idealized features of an alternative vision of reality. The possibility that the existing system contained a number of strengths that might be built upon and that this vision of the future might not be wholly achievable in practice was ignored.

This strategy of critical radicalism — based on stereotyped portrayals of prevailing practices and comparisons with an idealized future — has partially re-emerged in the 1999 reform exercise and takes two forms. Firstly, in contrast to TOC, recent policy-oriented documents have directed their criticism more at the features of the system than its practitioners or the pedagogy used. Thus the *Education Blueprint for the 21st Century* (Education Commission 1999a, p. 15) explains:

... our education system appears to have stagnated in the industrial age. The system still caters to a selected few, whilst disadvantaging the majority and creating a large number of losers. There are comments that kindergartens are teaching our children a curriculum that is too advanced for their age; school children have to cope with too much homework; and the structure of basic education is fraught with hurdles and dead-ends. Even in universities, students often have little experience outside their specialised areas of study. Many students stop learning after graduation, or are simply tired of learning even before graduation. This runs counter to the expectations of a lifelong learning society and poses a serious challenge to Hong Kong.

Secondly, the recent introduction of a range of policies designed to increase the monitoring and surveillance of teachers (e.g. Benchmarking in Language and Information Technology) has served to reinforce the conception that teachers' competencies are perceived as deficient. This initial discourse has also been reflected within the public forums organized to discuss the current educational reform, and the associated media coverage. The newspapers have been replete with commentaries and letters critical of schooling. Often, this takes the form of comparing the worst features of local schools (examination-oriented and élitist) and local teaching (rote learning, passive pupils, teacher-centred) with the (perceived) attributes of the best élite schools elsewhere.

Overall, a discourse has emerged which tends to portray teachers as an undifferentiated, homogeneous and inadequate group reliant on rote-learning techniques. Clearly, some teachers are inadequate, but there are many talented practitioners, some of whom will reject those aspects of reforms that violate their understanding of what helps pupils to learn. However, their minimal role in the process of reform suggests that they possess no distinctive professional expertise beyond that of any other

commentator on schooling. The implicit corollary of this portrayal is that there are no existing developments or practices worthy of continuing or developing — this is addressed below. Good practice is portrayed as a goal only of the future and does not exist in the present. Paradoxically therefore the logic of reform is premised on a critique of teachers' lack of professionalism, but the implementation of change is dependent on a high level of teacher professionalism.

A secondary problem with these stereotypes of pedagogy is that they assume teacher-centred instruction is always ineffective and that pupil-centred interactive teaching is always effective. Our research indicates that such assumptions are invalid and that there are many examples of good pedagogical practice operating in local schools that essentially involve a form of interactive whole-class teaching. The research group in the Department of Curriculum Studies at the University of Hong Kong, funded by the Standing Committee on Language Education and Research, is engaged in developing a more detailed description of the features of effective teaching of Chinese Language and English Language (Mok et al. 2000). Other examples of sources of good practice can be found in the projects supported by the Curriculum Tailoring/Adaptation scheme and the Quality Education Fund. These could provide the basis for a reform agenda that derives its vision from the strengths and realities of the local context. Fortunately, there are indications that this lesson has been heeded and that future curriculum initiatives will recognize and promote good practice.

### **Lack of Continuity**

The second feature relates to the combined themes of a lack of continuity and development, and is a consequence of the feature discussed above, namely, the reliance on a critical portrayal of schools and a deficit model of teachers. Reforms do not emerge from a policy vacuum nor do they enter into a vacuum within schools — they enter into a context that is replete with earlier innovations and reform initiatives. TOC was preceded by a range of innovations promoted by different sections of the government, including, *inter alia*, the Activity Approach, the School-based Curriculum Tailoring Scheme, the School Management Initiative, and Mastery Learning. But a form of historical amnesia seemed to have operated as policy documents ignored previous innovations that had been introduced to address the same problems identified by TOC. As we saw in earlier chapters, a school's experience of these earlier initiatives was a powerful influence on how TOC was interpreted.

However, TOC's relationship with earlier innovations was never clearly

understood. Its high profile, along with the critique of existing practices, suggested that it took precedence over and was designed to replace all previous initiatives. There was uncertainty and confusion as teachers attempted to understand the relationship among the plethora of seemingly unrelated reforms. A perception emerged that there was an absence of a clear long-term policy direction, a tendency to lurch from one fashionable (and imported) initiative to another, and an innovation overload, that further ad hoc reforms could be anticipated, and that no single reform initiative was supported for long enough to allow it to have an impact on classrooms.

Currently, this scenario is repeating itself — as the government promotes through education its vision of a distinctive new society, and educational reform provides the most visible forum for politicians to enhance their public profile. The outcome is a policy agenda that is portrayed by senior members of the policy-making community as distinctive from, rather than building upon, earlier reform initiatives or ongoing practices. This is primarily achieved by ignoring all references to earlier initiatives in policy pronouncements. The resulting perception of the public and of teachers, as noted in Chapter Two, is that TOC has been abandoned and has failed, despite in reality the strong element of continuity between TOC and the features of more recent innovations (e.g. the English Language curriculum) and the efforts of the Education Department (ED) to establish those linkages.

Similarly, in the quest for lifelong learning and reform of matriculation courses, previous initiatives such as the creation of the Open University and the introduction of Liberal Studies are studiously ignored. The impression emerges that policy-makers have decided to begin the process of reform with a clean sheet (or empty vessel) uncluttered by the realities of the past or present. Thus, current reforms are linked to the past only through their common critique of schools and teachers and their failure to build upon existing examples of good practice. The impact on innovative teachers and schools merely reinforces the message of the critical discourse referred to earlier. Teachers who had improved their teaching by adapting an aspect of a previous innovation, such as TOC, are now effectively being told that their efforts were wasted. The perceived absence of any continuity and connection between the 1999 reform exercise and previous initiatives serves to demoralize innovative teachers and school principals who have learnt to ignore ED/government initiatives and pursue their own ways for improving schools. Furthermore, it serves to underline the politicized and transient nature of educational reforms.

The lack of continuity of policy is likely to reinforce the perception in schools that there is innovation overload and that educational reforms are



short-term and ad hoc expedients of a more symbolic than substantive nature. Insofar as the current reform exercise is addressing questions related to aims, curriculum and school structure, it has the potential to locate specific changes within a comprehensive reform agenda. However, the sheer range and scale of the proposed changes (which potentially include a shift from a 6-7-3 to a 6-6-4 structure for the years of education, the abolition of selection and banding prior to Secondary One, the integration of school subjects, and a change in the criteria by which pupils are selected for tertiary education) heightens the potential for innovation overload and a lack of stability.

### **Reliance on Rhetoric**

The third and associated feature which characterized the initial phase of TOC involved a reliance on what Smith and Keith (1971, p. 10) term the 'alternative of grandeur' (a tendency to focus on the worthwhile intentions of reform) and on the use of rhetoric (which relies on assertion and emotive language). As Tyack and Cuban (1995, p. 132) observe:

... the dream of a golden age in the future has often been a central theme in utopian designs to reinvent education in the present.

Initially the proponents of TOC focused on the visions of the reform and the inadequacy of the current curriculum partly because there was an absence of operational details and resources. Policy-makers and in-service courses stressed its vision and aims. Teachers meanwhile were asking for practical and operational details: What was the nature of classroom tasks? How did this all link to the existing subject-based curricula? How would pupils be assessed? Policy-makers were initially unable to respond to these concerns, essentially because the practical concerns of teachers had neither been identified nor addressed. Strategies employed to justify the lack of attention to the practical issues that concerned teachers stressed a combination of the need for school-based curriculum development and the need for greater teacher professionalism. Thus it was effectively left to schools and teachers to devise appropriate resources and assessment instruments to support TOC, and responsibility for non-implementation was located in schools. TOC's initial reliance on rhetoric declined as resources and support were provided to teachers partly in response to the highly critical public reaction to TOC.

As the TOC experience demonstrated, neither teachers nor the public in general were opposed to the idea of reform when it was expressed in

terms of broad and general statements such as 'improving the quality of learning'. Opposition and concerns emerged when that goal was translated into actions that affected the ways in which pupils were taught and assessed. The critical point here is that a mandate for school reform based on a critique of the status quo does not readily translate into a mandate for any specific set of policy actions.

The use of a generalized and rhetorical discourse has, to date, similarly characterized the current review of the educational system. Thus, while TOC employed terms such as 'ever-improving capabilities' and 'improving the quality of learning', the 1999 review has coined terms such as 'to enjoy learning', 'lifelong learning' and (the need for a) 'knowledge society'. There is extensive public debate that, as noted earlier, has focused on the perceived weaknesses of schooling and of general support for the pursuit of goals such as school improvement, enhanced effectiveness and lifelong learning. However, these goals have no direct connection with any specific set of problems nor concrete policy actions, and it is the actions which will bring out the competing conceptions of what people expect of schools, what they want to keep and change, and essentially the community's priorities. There is a danger, as was the case with TOC, that a general climate supportive of the rhetoric of school improvement is taken as a mandate for a specific set of policy actions and that public consultation focuses on a combination of critique (about the present) and rhetoric (about the future).

However, it is unclear as yet how the existing reform exercise plans to directly support school improvement. Reforms in one area seem to be justified by reference to the need for radical change in another area. The potential result is a cycle of reforms which focus on assessment and structure that are mutually dependent, but which contain a number of inherent contradictions and which the system has neither the capacity to resource nor cope with simultaneously.

### **Lack of Coherence**

The fourth feature of the TOC experience that provides a salutary lesson relates to questions of policy coherence and commitment. In the initial phase of TOC, school personnel were acutely aware that various subgroups at different levels of the government conceived of the reform in very different ways (which were described in Chapter Two) or subverted it in direct or indirect ways. As the reform moved from policy intention to policy action, so it met with reinterpretation, resistance and distortion within the state bureaucracy. The extent of resistance was far greater than

that which existed in many schools. Teachers who attended seminars and courses provided by the government to promote the reform regularly reported that they received very different, often contradictory and sometimes negative messages about TOC. This confusion was exacerbated by the power struggle which emerged as groups whose careers and status in the bureaucracy were linked to other existing innovations, such as the Activity Approach, Mastery Learning, curriculum integration and the School Management Initiative, attempted to promote and defend their territories against incursion by TOC. This contributed to the reinforcement of the combination of pragmatic scepticism and procrastination that characterized many teachers' attitudes.

There was also an ongoing concern with TOC that the government's commitment to any specific reform programme was weak and only of a short-term duration. Previous experience suggested that new reforms were more symbolic than substantive and that any specific reform would soon be replaced by other discrete and unlinked initiatives. Further, the impending transfer of political sovereignty also served to underline the transitory nature of TOC as teachers accurately anticipated its demise after the handover in 1997. Their worries have proved to be well grounded as TOC gave way to another wave of reforms — Information Technology in education and the holistic reform.

At present, it is too early to anticipate whether a similar problem will occur with the 1999 reform as it has not yet moved into specifying policy actions and an implementation schedule. The potential for greater coherence and long-term commitment by the current government is potentially greater with the departure of the colonial power which operated with both a low level of legitimacy (which severely constrained its capacity to implement reforms) and a short time horizon. However, this effect could be overridden by a combination of two recent trends that were alluded to earlier. The first involves what Scott (2000) refers to as the increasing disarticulation or disjointedness among the institutional components of the political system as the legislature, executive and bureaucracy publicly compete to define the priorities of policy. This disarticulation in the educational arena (Morris, Kan and Morris 2000) is manifested in the pronouncements (which are often in tension) from members of the various components of the political system. Examples of recent dichotomous pronouncements, which highlight the current tendency of the policy-making community to publicly promote ideological contradictions, include the following:

- that selective assessments prior to the ending of secondary schooling should be used to determine and publicize the effectiveness of individual schools and that those assessments should be abolished;

- that pupils should study in their mother tongue and that Putonghua should be adopted as the medium of instruction in Chinese Language education in the long term;
- that the quality of schooling should be of paramount concern and that the selection of pupils for tertiary education should be based on a pass-fail assessment and that weightings be given to schools;
- that secondary schools should be more responsive to the demands of parents and the market and that they should be barred from selecting pupils on the basis of their language (i.e. English) competence; and
- that the curriculum of the matriculation programme be broadened and that the matriculation examination assess competence only in Chinese Language, English Language and Mathematics.

These statements serve to underline the extent to which schools are expected to serve different and often contradictory purposes (Tyack and Cuban 1995). What is novel is that these contradictions are being promoted simultaneously and publicly by sectors within the educational policy-making community.

Secondly, as noted earlier, schooling generally and educational reform specifically have become more central to the political agenda and have effectively replaced discussion of the nature and development of the political system as the key items for public debate. This could serve to reinforce the reliance on a series of ad hoc educational reforms and the associated ongoing critique of schools and teachers as education is focused on by aspiring politicians and government officials.

## **Pedagogy and Assessment**

The fifth and final feature of the TOC experience relates to the contrasting role of assessment and pedagogy as the objects of reform. Assessment was, for many teachers, that element of the curriculum that served as the foundation of their role as educators as it provided both the external target for which they and pupils jointly prepared and the basis on which their effectiveness was judged. Assessments are conducted with reference to essentially meritocratic criteria, aimed at ensuring the perceived fairness and objectivity of the process. The desire of teachers to help their pupils to do well in examinations and their reluctance to engage directly in selective assessment were laudable. The development of a more formative type of assessment linked more to teaching than testing was that part of the reform that was most difficult to achieve in schools. This was partly a function of a strongly embedded meritocratic ideology and of the powerful

impact of assessment on all aspects of the curriculum, but it was also influenced by the tendency for assessment traditionally to be the last item to be addressed in the overall process of reform — after the new aims, visions, prescriptions for pedagogy, and curricular resources had been provided.

This was the case with TOC, as the reform of the central assessment system at Primary Six was deferred until eventually it was no longer necessary as TOC was replaced by other reforms. In effect, the most powerful and resilient element of the school curriculum has traditionally been the final focus of reform activities. This has often in practice resulted in little change as the key policy-makers and advocates of reform have moved on and their successors have initiated a new reform agenda before the system of assessments was changed.

While we noted with regard to TOC the resilience of both assessment systems and conceptions of how these affected the teacher's role, we also highlighted the willingness of many teachers to explore pedagogical changes which they perceived as helping to improve the quality of learning and pupils' enjoyment of their lessons. This tendency was reflected at the policy level, which shifted the formal doctrine of TOC to stress goals related to pedagogy and learning rather than assessment. Essentially, teachers were willing to change their pedagogy — albeit in ways which were not radical and which allowed them to maintain control of the class — if they could see that pupils learnt more effectively. Usually, the willingness to innovate in the classroom was based not on the exhortations of reformers, but rather on the opportunity to share and experience practical alternatives with colleagues. The resources and teacher training provided to support TOC contributed to this process. How this was facilitated in schools is explored in the next section.

The embedded nature and centrality of assessment systems necessitates caution as to how to proceed and the pace of change. The rapid removal of the existing assessment systems may leave a vacuum and, despite their manifest limitations, these mechanisms have served to create an essentially meritocratic system which avoids the real unfairness in selecting pupils, namely, patronage and socio-economic status. Further, assessment can be designed to produce positive washback effects. The basic dilemma is that if selective systems of assessment are rapidly removed, they will not be quickly replaced by systems that are more formative in their function, and so systems for allocating pupils to schools of varied quality relying on criteria which are perceived as unfair could emerge.

In the ongoing reform exercise, the debate has focused on the structural features of schooling, especially the length of secondary schooling and the quest to abolish selective assessments. However, as noted earlier, much of

the public debate has stressed the weakness of pedagogical practices and teachers' professionalism through reference to memorization, rote learning, teacher-centred instruction and passive pupils. The goals of the current reform exercise, with regard to pedagogy, are at best vague and have relied on exhortations such as 'to ensure pupils enjoy their learning'. Consequently the linkages are weak between the current policy solutions being discussed and both the perceived problems of schooling (teacher sensitivity and professionalism) and that aspect which teachers were willing to change (namely pedagogy).

If pupils are to benefit from the reforms, and in the final analysis they are the intended beneficiaries, then it is the quality of teaching and learning that needs to be improved. To date, it is not clear how the ongoing reform exercise plans to support the improvement of pedagogy.

In the section which follows, we move away from our orientation on policy-making and focus on identifying those lessons about supporting educational improvement which can be learnt from within schools.

## **MANAGING AND SUPPORTING CHANGE IN SCHOOLS**

Within most schools, TOC was introduced using a top-down strategy. Where there was a strong school head or senior management team, they tended to claim ownership of the reform and focused on systemic, visible and procedural changes, such as changes in infrastructure to support the reform, the provision of extra resources, the development of new teaching plans, schedules and materials, or changing the assessment procedures and record forms. These aspects helped to create an image of an innovative school, which usually meant that the main concern was to produce public documents that demonstrated the school's commitment to reform.

In the initial stage, teachers in general expected and appreciated strong leadership as they felt that they were fully supported by the management. However, as teachers became involved in the reform, they also developed ownership. Their concerns, though, were very different from those of the management — the critical one being whether or not the changes were having a positive impact on the learning of their pupils. Teachers often viewed the management's preoccupation with public manifestations of change as peripheral. Conflict or even confrontation occurred when schools were unable to cope with this dichotomy. Therefore, the school head and senior management team need to be sensitive to the needs and concerns of teachers, and this awareness needs to be reflected in approaches to school management. While administrative leadership can facilitate the

initiation of a reform, academic leadership is necessary for its further development. The management should know when to take up a leadership role and when to let go and allow teachers to make collective decisions concerning their work.

We found that in some case-study schools, problems arose because of a communication breakdown. This problem arose especially when there was just a single channel for communication, such as when a school head would disseminate information only through the middle managers. Alternative channels need to be available as a mechanism for the teachers and the school head to talk directly should the main channel break down or become blocked.

A similar communication problem was created by the jargon used by curriculum planners. A prime example of this concerned the new pedagogy promoted by the reform. The study found that not only teachers but also many of the teacher educators who were involved in disseminating the reform had difficulty understanding what the new pedagogy was about and how it should be translated into classroom practice. As a result, the pedagogy promoted was arcane. Some teachers felt that they were expected to abandon all that they were doing and learn new tricks, and consequently felt de-skilled. Yet we found that some of the teachers were in fact doing a remarkable job and had been using many of the 'new' practices long before TOC was introduced. However, because such practices were dressed up in terms like 'task-based learning' and 'formative assessment', some teachers were unable to recognize that they had been using such methods all along. In general, they just lacked the required language to talk about their teaching, but this did not mean that they were unable to teach well.

As noted earlier, when introducing any reform, it is important that good existing practices should be identified and built on. It is dangerous to label teaching strategies and attach to them positive or negative connotations. For example, 'progressive' is associated with good practice and 'traditional' is associated with bad practice. We have already shown that it is not the teaching strategies *per se* that matter; what really counts is how teachers actually use these strategies to make a difference to pupils' learning outcomes. Any training provided to teachers to adopt an innovation must demonstrate how it can be realized in the classroom and not just rely on crude dichotomies and rhetoric.

We also found that most of the teachers were hard-working and willing to put in extra efforts if they could see that their work was benefiting the children. For example, they did not mind spending time discussing their lesson plans, making teaching aids and preparing worksheets for the pupils, but they were very sceptical about filling in record cards, carrying out complex computation and transformation of

marks and filling in detailed assessment forms. Teachers in general felt that their workload had already reached a saturation point. Therefore, any reform that leads to an increase in workload that is of a clerical or procedural nature would not meet with the approval of the teachers. Instead, teachers respond best to reforms that are focused on learning and are seen as having a direct, positive impact on classroom teaching and learning.

The classroom is where all the contradictions of schooling and dilemmas in social and personal beliefs and values are played out. Many educational innovations and reforms have been unsuccessful in changing classroom practice because there was not enough consideration of the social conditions of schooling and the constraints of the classroom situation. Many teachers are left helpless, because in contrast to the policy-making arena where contradictions can coexist at the rhetorical level, teachers have to resolve them in the classroom (Morris and Lo 2000).

Attempts to 'develop' teachers often fail when they adopt a technical perspective in which teachers are regarded merely as instruments for the reform. If the goal of developing a professional teaching force is to be facilitated, teachers must be able to give professional reasons for their actions and be able to account for and examine the constraints under which they operate. This cannot be achieved if teachers work in isolation. It is necessary for them to heighten their collective consciousness (Bowden and Marton 1998) through engaging in discourses that help them to see others' viewpoints and build a shared view of what constitutes good teaching and learning. Therefore, it is essential to devise time and space for teachers in schools to work together as a team to plan and discuss the curriculum and classroom teaching/learning. In our study, we found that where schools had structured the timetable in such a way that a group of teachers could meet to discuss and plan together, the improvement of classroom practices was greatly facilitated. Such activities are crucial to the implementation of reforms and so should not be left to the goodwill of teachers to do after-hours. They should be structured into teachers' timetabled workload. We found that one unintended outcome of TOC was the professional development of some teachers. In these cases, TOC provided an opportunity for their personal development through: making adjustments to their pedagogy and getting positive feedback from their pupils; taking part in curriculum development; working with colleagues as a team; becoming involved in government committees; and associating with tertiary institutions, researchers and other schools. Professional development should involve individual development so that teachers gain a broader view of their professional world.

TOC often failed to have significant impact in schools where the



reform was regarded as the responsibility of a few people, such as the school head, senior teachers, the TOC co-ordinator, or only those teachers responsible for TOC classes. It worked well in schools where every teacher was involved — for example when teachers in different subject groups worked together to plan and implement TOC in their subject areas, to contribute to the pool of resources and to help with writing task sheets or assessment tasks. Some teachers also organized classroom observations by colleagues to assess the effectiveness of their planned lesson. The reform generated the most momentum when the work was seen to be helping teachers to improve their classroom practices and to experience success with their pupils.

The emergence of a sense of team spirit and a climate of collegiality broke down in some cases when the work was associated with the promotion of, or benefits to, individuals. Schools should ensure that the glory of the achievement of the school is shared by all teachers. In some instances, when the school was invited to give a number of public presentations concerning their work, as many teachers as possible were involved. This practice demonstrated sensitivity to teachers' feelings so that they did not feel that only a few people were reaping the benefit of their hard work. School heads and senior management should give frequent and positive feedback to teachers, so that the teachers are motivated to build on their own successful experiences. One school head did this by writing thank-you letters to teachers from time to time to show her appreciation of their efforts. This greatly helped to improve the morale and confidence of the teachers in her school.

The introduction of any innovation to a school upsets the state of equilibrium and causes changes, some of which are unpredictable. As reforms are complex and fluid, schools need to know which stage of implementation they have reached and to understand the changes that are occurring in the school and its culture. With this knowledge, they may respond in a timely manner to the demands of the situation, meet the expectations of its stakeholders and steer the reform in the agreed direction. This is easier to achieve if schools and teachers take an action research approach to evaluate what they are doing, and make use of this information for the next action-evaluation-feedback cycle. Schools would be able to deal with problems proactively if they continuously assess their own situation. Our study showed that some schools, not being aware of problems that were developing underneath a seemingly successful and smooth implementation, were thrown into confusion when having to confront a critical event, and a range of problems surfaced. We also found that those teachers who worked in close collaboration with university researchers and other professionals, such as those in the Curriculum

Development Institute, tended to exhibit more professional development and growth. This is probably because, as shown in Chapter Six, such teachers received feedback on and endorsement of their work, which helped them to raise their professional consciousness and in turn helped them to improve their analytical awareness. Teachers, like pupils, need positive reinforcement and feedback about what they are doing right.

## CONCLUSION

Is it possible to improve the quality of learning and move schools closer to achieving the laudable aims of education that have been regularly identified? There are both optimistic and pessimistic answers to this question that emerge from this study. The optimistic answer emerges from those schools in which teachers demonstrated a capacity to change if they were given support, time and encouragement in ways which enhanced their professional development and built upon their successes.

The basis for a more pessimistic answer is derived from the processes of policy-making and dissemination which suggest that we are learning slowly from either previous reform efforts in Hong Kong or the burgeoning international literature on how to support the improvement of schools. Specifically, policy has been characterized by its reliance on a deficit model of schooling and the promotion of radical solutions. Teachers have been portrayed as an undifferentiated group of low-level professionals who rely on teacher-centred instruction, rote learning and selective examinations. In effect, they are being critiqued for operating with a deficit model of learning (pupils are empty vessels to be filled and tested) on the grounds that this has a negative impact on some pupils' motivation and their capacity for critical and creative thinking. Teachers are being exhorted to use pedagogical strategies, derived from a social constructivist perspective on learning, which are sensitive to pupils' prior learning and experiences, encourage collaboration, provide constructive feedback, build upon success and respect individual differences.

The preceding chapters have served to demonstrate how both schools as organizations and teachers respond to a curriculum reform. For those innovative schools and individuals that used TOC as a vehicle for improvement, the conditions that facilitated change correspond to those that are central to the social constructivist perspective on learning that teachers have been encouraged to adopt. Specifically, schools and teachers respond to reforms in terms of their prior learning and experiences. Change is encouraged when success is acknowledged and built upon, collaboration

is encouraged, constructive feedback is provided, adequate time is allowed for reflection and change, and when the actions promoted allow flexibility for individual differences and emphases. Paradoxically, however, a deficit model of teachers and pedagogy has been central to the initiation, development and dissemination of educational reform initiatives in Hong Kong.

We do not expect pupils to learn and improve if their performance is constantly critiqued, if their prior learning is ignored, if good practices are not recognized, and if overall they are treated as empty vessels or blank sheets of paper with no prior history or achievements. The same applies to teachers and schools. As Tyack and Cuban (1995, p. 133) conclude in their analysis of educational reform in the USA:

Rather than starting from scratch in reinventing schools, it makes most sense to us to graft thoughtful reforms onto what is healthy in the present system. Schooling is being reinvented all the time, but not necessarily in ways envisaged in macro planning. Good teachers reinvent the world every day for the children in their classes.

# 12

## Issues in Evaluating a Large-scale Curriculum Reform

*Ka-ki Chan*

### **INTRODUCTION**

The purpose of this chapter is to explore issues relating to the evaluation of a large-scale curriculum reform and their solutions, based on a four-year study, the Target Oriented Curriculum (TOC) Evaluation Project in Hong Kong. The project involved the interaction among applied research (evaluation) that originated in academic institutions, the complex features of the reform, and the role of the government as the proponent of the reform. Three types of issues emerged and are analysed in this chapter, namely, the methodological, the professional and the political. It is argued that a constant process of feedback and adjustment is a characteristic of evaluating a large-scale reform that is located in complex and dynamic institutional, political and ideological settings. Such a process includes: building rapport with stakeholders; developing an awareness of researchers' effect; having a purpose, focus and perspectives; maintaining consistent judgement criteria; respecting professional and school autonomy; and showing concern for the impact on policy. All these have significant implications for the value of evaluation to policy-making.

## CONTEXT OF THE STUDY

The paradigm shifts and conceptual complexity of TOC described in Chapter One had evolved, been understood, interpreted and operated variously at policy, school and classroom levels. At the policy level, TOC was intended to replace in 1995 the old syllabuses of Chinese Language, English Language and Mathematics in all primary schools, starting from Primary One, and to be implemented at all primary levels in 2001. A huge amount of money was spent in staffing the government and agencies which provided teacher training for school heads and teachers, developing teaching and learning resources, and providing cash grants for schools that adopted the reform. The nature of TOC and the way the government introduced and promoted the reform created controversy among teachers, school heads, parents, academics, government officials and the public. Before the TOC Evaluation Project, there was no such precedence for the government of Hong Kong as a policy-maker to accept an evaluation of its policy by an external body. In fact, most previous evaluations of educational innovations were conducted by the providers of the innovations and bore the hallmark of self-legitimization.

Different stakeholders in the reform, as a matter of different or conflicting interests, were in search of answers to inform decisions about the future of TOC. Some schools sought help to improve their implementation of TOC, and were suspicious of outsiders who were seen as inspectors or judges of their abilities to reform. Other schools were expecting the government to abandon the reform after the return of sovereignty of Hong Kong to the Mainland after 1997. Some academics wanted a critique or refutation of TOC. The media and politicians wanted simple answers as to whether the reform should continue or not. Research studies at the school level emerged in tertiary institutions and small school networks. As with many studies conducted outside the government in the past, it is not certain whether they were consulted when new policy decisions were being made. On the other hand, the government certainly was concerned with finding ways that could show quick results and an endorsement for full adoption and implementation of TOC. All these concerns generated the politics of the reform, and were resolved by the methodology design and decisions in the professional domain analysed below.

The TOC evaluation study involved three distinct stages, each of which was different as it responded to the changing policy contexts. These shifts affected the study as it had to adjust and respond to continually emerging questions of motivation or goal, focus, sources of funding, evaluation theory, design and methods, reporting and impact. These are summarized in Table 12.1.

Table 12.1 Phases of the Evaluation Study

	<i>Phase I</i>	<i>Phase II</i>	<i>Phase III</i>
Motivation and purpose	<ul style="list-style-type: none"> <li>• To inform decision for improving reforms</li> <li>• Accountability to academic excellence in university institutions</li> </ul>	To respond to the critical issue of assessment and to maintain a longitudinal study	To refocus on specific issues considered significant in the reform
Focus	Exploring the nature of change at various levels	Specific issues of public concern	Selected for academic interests
Funding source	University fund from outside source	Government	Grant for academic institutions
Evaluation perspectives	Development	Accountability	Knowledge
Methodologies	Mixed methods: documentary analysis, interviews, questionnaire survey, multi-site and maximum-variation case studies using quantitative and qualitative methods	Same as Phase I but more articulated on assessment issues	Same as Phase I but more selected case studies
Reporting	Public report, responsive to government need, slight negotiation	Confidential case-study report	Academic publication
Impact on policy/ utilization of report findings	Wide acceptance by schools for reform	Public attention, impact on assessment policy	Limited attention

The first phase (1995–96) of the study was motivated by a desire on the part of academics to provide an independent judgement on the largest attempt by the government to reform the school curriculum in Hong Kong. It was undertaken by a research team at the University of Hong Kong, and funded by income from a course on curriculum leadership for school heads run by a teacher education unit of the university as well as funds from a commercial enterprise. Nine academics, one senior research assistant and a research assistant participated in Phase I. The publication of an evaluation report was proposed to the government by the team, contrary to the convention whereby the government itself conducted the evaluation of educational policy. In the absence of a direct government

role in the research process, the research team was free from any contractual relationship in terms of research design and procedures that could have limited its degree of independence in the public eye and its capacity to publish the results.

However, the funding for the first phase was sufficient for only a one-year study to understand the reform comprehensively at Primary One level in 1995–96, which resulted in the Interim Report (Morris et al. 1996). The study at Primary Two and Three levels in 1996–98 was supported by the Research Grant Council, which awarded grants based on academic merit. The design of the second phase was basically a continuation of the first one. In response to a recommendation of the Interim Report to investigate further the controversial issue of student assessment (which had generated heavy public criticism), the government invited tenders for a one-year study. The research team was contracted on the basis of its ability to generate insights using previous studies and data collected.

The following sections discuss some of the political, methodological and professional issues arising from the study.

## **POLITICAL ISSUES**

Issues are regarded as political in nature when there was a strong overtone to use the study in order to create specific strategies to achieve a pre-defined purpose in the face of a conflict of professional interest. This, however, did not preclude a mix with methodological and professional considerations. Often, decisions on political actions were guided by ethical principles including concern for the rights of, or consequences to, the informants, the duty or responsibility of researchers, and care for the entire reform situation as analysed below.

A good rapport with schools and the government, who were both stakeholders and key informants of the evaluation, was crucial to maintain the momentum of the study. The latter wanted endorsement of the policy, while the former wanted a wholly critical evaluation. Either stance would have undermined the credibility of the project. In the tripartite relationship, a delicate balance needed to be struck between the resisting schools and the government, who confronted each other. The course on curriculum leadership conducted by several members of the research team prior to the research served to build up a trustful relationship with all the seventy-six schools introducing TOC in the first year of implementation, and this helped ensure that the views of the research team would be credible.

Entry into case-study schools was crucial to the study and involved a number of negotiation skills. These were essential as there is a tendency among Hong Kong teachers to resist classroom observation by outsiders. It is perceived as an intrusion into their professional autonomy, linked to inspection and promotion, and hence a potential source of jeopardy to their career prospects. Three core values or principles were used to guide consistent practices among researchers to ensure validity of data. These were:

- respect for the autonomy of schools and teachers to accept or decline the invitation to participate in the research;
- care to avoid judgement on teachers and undesirable consequences on them; and
- assurance of non-manipulation and non-intervention.

Schools and teachers were given a period of time to respond to the invitation made by personal contact and a letter, which set out the following:

- the study would be conducted in a natural classroom setting without creating extra workload for teachers;
- the goal of the research was to raise the quality of teaching and learning;
- personal information and the identity of the school would be kept confidential;
- classroom observations and interviews would be conducted when it was convenient to teachers;
- the name of the researcher; and
- the willingness of the researcher to help or advise the school on curriculum matters and staff development.

The second political issue involved how to report the evaluation. There was a tension between the professional autonomy of researchers to report accurately and the confidentiality of informants and schools. This was generally resolved by reporting at two levels. The first level was the sharing of data among members of the research team. The second was a public comprehensive report on all levels of analysis with case-study reports that was issued free to the government and all schools that had responded to the study. For other parties, the report was available for sale to subsidize the research fund. There were always limitations to the amount of detail that could be reported publicly. On the other hand, each case-study school was entitled to know how the evaluator viewed its experience of reform, while having its confidentiality respected. There was, nevertheless, a struggle to decide exactly how detailed each case study in the Interim Report should be. Each case study was expected to illuminate



the distinct context of the school and its relationship to the complexity of the reform. Since the case studies were chosen by maximum variation, some schools could be easily identified by those familiar with different school settings. An effort was made to negotiate the case-study reports to be published as a public document. A draft was sent to the schools concerned and, as a result of the feedback, the language and content of some case-study reports were modified very carefully. The decision to consult the schools on the content of the case-study reports was taken late in the day, but in the event proved felicitous. Two case-study schools ceased to support the project after Phase I partly because they felt that the published reports were too judgemental of individual teachers and too critical of the schools. Without the consultation exercise, the number could have been greater and the project could have attracted unfavourable publicity.

A further challenge arose when it was decided to translate the original version written in English into Chinese. The translation by an outside agency did not always reflect the intended meaning of the English text, and care was taken to make necessary adjustments before it was published.

A threat to the rapport with schools and hence the continuity of the study arose mainly from the conflict between the professionals and the informants over the ownership of data or information. As noted above, two schools were offended by the Interim Report and withdrew from the project. A minor crisis also occurred when a researcher was perceived as being coercive in asking a school to accept a proposed arrangement of data collection without allowing room for negotiation. Sometimes, the rapport was affected by external factors — such as intervention by school funding bodies — rather than the relationships among the school heads, teachers and the researchers. The lessons learnt from these incidents for evaluation research are, firstly, the need for respect for and negotiation with the informants, and secondly, the need for sensitivity where the report is likely to be critical of individuals or institutions.

## **METHODOLOGICAL ISSUES**

The commonly used evaluation models espoused by Tyler, Stake, Lee and Cronbach, and Parlett (Madaus and Kellaghan 1992) for curriculum innovations provided useful insights and background knowledge for designing this study. The study employed an eclectic and interactive multiple-method approach which was not new in evaluating large public

programmes nearing the twenty-first century (Datta 1997). The main features of the study were, firstly, a change in purpose and focus in response to changing contexts and emerging data, and secondly, the use of multiple methods and case studies.

## **Purpose and Focus**

The purpose and focus of the study were affected by the research perspectives of the research team. Chelimsky (1997) identifies three major types of perspectives: the accountability perspective, which stresses the study of programme efficiency; the development perspective, which is concerned with strengthening the educational provision of institutions; and the knowledge or research perspective, which focuses on acquiring understanding in specific areas. In the early part of Phase I, there was a conflict between the accountability and development perspectives. It was appealing to use an accountability perspective, as there was plentiful official documentation to show the intentions of the reform. It would then be easy to use a fidelity perspective to evaluate the efficiency of the reform by analysing the extent to which the intentions were achieved. The concerns of different stakeholders described earlier suggested that it would be unethical to take an advocacy stance and ignore processes or factors that might affect the outcomes. As it became increasingly apparent that the government was not going to reverse the policy of introducing TOC to all schools in Hong Kong, the research team was driven by a desire to help schools and a recognition that the positive impact of reforms often occurred in unintended areas.

The consensus was a development perspective involving questions that aimed to illuminate various aspects of TOC implementation in Phase I, as shown in Figure 1.4 (p. 19). The TOC Interim Report published in 1996 was regarded as one of the most informative public reports to heads and teachers in primary schools and curriculum developers in the government (Clark 1999). The impact of the report was manifested at two levels. At the school level, some schools found the report a useful reference for understanding the concepts of the school curriculum and curricular trends. They also learnt from the case-study reports about the different possibilities of improving the school organization, culture and professional development of teachers. One school head actually required his teachers to study the report and tested their 'knowledge' of it. At the policy level, an effort was made by the ED to respond to the recommendations, especially the suggestion that a dichotomy or polarization of curriculum practices was to be avoided.

The second phase was driven more by an academic interest to continue with the study than a commitment to inform government decision-making. The continuity of the study was maintained through a more focused selection of aspects of the reform, including the impact of curriculum reform on schools as organizations, on classroom teaching and learning, and on assessment practices. The nature of the study was less evaluation/applied research than basic research that purported to generate knowledge about the nature of curriculum change in Hong Kong. The trade-off between the research for development perspective (strengthening government reform) and the research for knowledge perspective stemmed partly from the research team's accountability to the source of funding, i.e. the Research Grant Council, to make contributions to international publications. This was not to say that the two perspectives were mutually exclusive, but the readership of the latter was more restricted in the case of Hong Kong than the public report, which had an impact on schools.

The purpose of the third phase, which ran in parallel with Phase II in 1997–98, had a high degree of accountability to the government, who funded the research to seek solutions for the problems arising from TOC assessment. The team was required to focus on the key questions laid down by the contract, and a public report with recommendations for future assessment practices was published in 1999. The key questions focused on the work of teachers in assessment, including: how data was collected; how feedback was used in teaching and learning; effective feedback practices; use of feedback in strengthening the teaching-learning-assessment cycle; the competence of teachers; and the dissemination of good practices to schools.

### **Multiple Methods and Case Studies**

Traditionally, there has been a general feeling that quantitative research is superior to qualitative research in Hong Kong as the former could impress with large samples, figures and complex statistical design, despite the fact that the two serve different purposes. In effect, qualitative research is viewed in the same way as non-formal assessment methods — as being subjective and biased. The comprehensive nature of the study faced a conflict between the actual need to explore the untapped qualitative categories of data at various levels of analysis, and the expectations of the education sectors for large samples and powerful statistical figures. The conflict was alleviated by the realization that there was clearly much to be gained by combining the use of quantitative and qualitative methods. While the investigation of policy intentions could be based on documentary

sources and qualitative analysis, a reliable picture of how over 800 schools responded to the reform could be fruitfully obtained through sampled questionnaire surveys for all phases of the study. At the same time, more than sixty-five in-depth individual and focused interviews were conducted to collect information from policy-makers, school heads, subject department heads or co-ordinators, and pupils to ensure validity of data. The qualitative data gained from the interviews provided the basis for the categories used and issues addressed in the questionnaire surveys conducted in 1996 and 1998 respectively to trace the changing impact of TOC on schools. A saturated study of all schools adopting TOC and a sampled study of non-adopting schools were conducted in 1996, and the former again in 1998. The response rate was higher than sixty percent each time.

A key feature of the research design of this evaluation was the longitudinal study of multi-site case studies chosen by using multiple criteria. A maximum-variation technique was used to select schools based on: community location; motivation to introduce the reform; school type and sponsoring body; age of school; ability of pupil intake; and performance of pupils in Primary Six. These criteria were premised on the view that they were potential contextual factors affecting the impact of the reform processes and outcomes in schools. Two case-study schools thought to be similar to others were dropped after Phase I in order to save resources and to allow to be included in the study two new case-study schools that introduced TOC a year later and represented different experiences.

All case studies involved two methods of data collection, apart from documentary analysis of teaching/learning materials. Interviews with school heads and teachers were conducted every year by the same researchers using a common protocol to enable interschool comparisons. Interviews with parents and pupils were conducted in the third year focusing on assessment issues. The second method involved 256 lesson observations recorded by coding the classroom interactions and activities and making contextualized notes throughout the three years. Pre- and post-observation interviews were conducted to cross-check and supplement the phenomenon observed. This combination of data-gathering methods and the subsequent analysis by mixed methods were acceptable according to the criteria stipulated by Datta (1997) for two reasons. Firstly, the project could ask research questions that studied situations that could not be adequately explored in surveys, such as teachers' reflections of the professional development that was arising from their real-life experience of reform. Secondly, it helped to identify inconsistencies in the different techniques of data interpretation. For example, teachers' claims in surveys that they were competent in criterion-referenced assessment were contradicted by

the assessment practices observed in the case-study schools. The research team, however, was cautious that nesting the different levels of the study (policy, school and classroom) was only moderately acceptable. Attempts to connect levels were generally used to set the study of a level in the context of another — for instance, the connections between schools and classrooms, and the connections between policies and schools.

There was a dilemma in using maximum-variation case studies. On the one hand, every researcher could have good exposure of all aspects of the reform through working in at least one case-study school. On the other hand, it was difficult to have common paradigms and research interests among nine researchers that would facilitate comparisons across case studies. As a result, some case studies became focused sub-studies that complemented each other — for instance, the ecology of school reform (Chan 1998), or professional development (Lo 1998) — in understanding the linked impact of a multifaceted reform. More detailed analysis of case-study data showed that cross-case comparison could be meaningfully made in future publications.

The longitudinal nature of the study was sometimes affected by a change of personnel during the three phases of research. Each case study was largely a qualitative study using the case-study researcher as the research tool to interpret data collected in perspective. A change in personnel was critical as it involved a change of the research tool, for example, in terms of the discourse used, and hence affected the validity of data. To mitigate the effects of such an eventuality, the research project built up a system of raw data storage. An effort was also made to establish a standardized organization of discourse that highlighted significant features of the reform and the case-study school. However, it must be admitted that it was easier to generate insights at the school level from case studies that were researched by the same project members throughout the study.

## **Limitations**

A major limitation of the study was the decision, in view of available funding, to focus on all levels of the reform except its impact on pupils. It was agreed that an analysis of pupils' learning outcomes would entail a separate study. This was deemed a necessary trade-off as it would be difficult to account for the impact on pupils if a comprehensive picture of the reform was not obtained in the initial stage of the reform. The second limitation was the changing sources of funding and the nature of researchers' accountability, as noted above. In the later stages, this reduced the direct impact of the evaluation on ongoing policy decisions. Yet from

the perspective of research productivity, the study was valuable in producing a large diversity of publications in different fields, such as policy studies, pedagogical studies and organizational studies. These have provided a substantial insight into the progress of change in schools.

## **PROFESSIONAL ISSUES**

Issues classified as professional in nature arose from a sense of obligation and from the unique contribution and credibility of the researchers with regard to the evaluation. Two professional decisions were important in this study, namely, the judgement of the impact of the reform, to encompass the intended and unintended outcomes for instance, and the acceptance that the researchers were having an effect on policy as time went by. There was no attempt on the part of the government to influence the research team to produce a report that was wholly positive. However, when the Interim Report was published, feedback to the team indicated that the expectations of the government had been divided. Some officials seemed disappointed that the team had not advocated the reform or produced a glowing report. There were others who thought that the report was critical and fair.

### **Judgement Criteria**

The decision on judgement criteria was directly linked to the purpose of the study in different phases. There were conflicting values between faithful advocacy of reform features, such as the five fundamental ways of learning, task-based learning, and an open mind towards everything emerged from the reform. Traditionally in Hong Kong, evaluators were seen as advocates of reform. This was not the intention of the team and so a consensus concerning judgement criteria was needed in the first phase to take collective responsibility for the Interim Report. The development perspective was eventually decided after repeated discussion, and the study focused on the intended and unintended impacts of change on schools rather than only on the fidelity of schools' responses to reform features.

### **Researchers' Effect**

The researchers' effect on the research outcomes was attributed to the

changing roles of team members in the three phases. The fact that the independence of the researchers diminished over the phases of the research was a test of their role and values, especially for those involved in the case studies. In Phase I, the role of researchers as independent evaluators was acceptable to school heads and teachers of the case-study schools as the team were outsiders of the reform. The informal reporting of possibilities and constraints in each case-study school, coupled with the Interim Report (Morris et al. 1996), however, had encouraged reflective thinking among school heads and teachers in most case-study schools.

The case-study reports delivered by the research team were regarded by the schools as very useful for school improvement. For example, one school head who was newly appointed to the school said that the report helped to point out the strengths and weaknesses of the school and teachers. In the second phase, some schools looked upon the researchers as valuable consultants of the TOC reform. The researchers had the autonomy to decide on their relationships with their case-study schools. They were often guided by their academic interests in specific areas of research, yet it did not mean that there was necessarily incompatibility between such research and the evaluation project. It became a matter of how the data were used and reported. Many of the publications in the second phase were devoted to theorizing change at various levels such as the classroom. In the case of an evaluation report, it was necessary to be aware of the growing insiders' role of the researchers, and to take into account the nature of researcher effect in the reform process.

### **Impact on Reforms**

In the absence of a formal commitment to produce an evaluation report to inform policy in the second phase, there was a tendency for researchers to publish papers which addressed issues in the international literature on curriculum reform and school change, and less concern with making a direct impact on policy. Papers on TOC reform in academic publications such as journals or books took more time to be accessible to readers as a result of the refereed review system. Moreover, many users of the reform are not in the habit of reading academic publications, especially those in English. The ultimate effect was that it was less clear about the extent to which the academic publications had an impact on different reform users. In contrast, the public report on assessment commissioned by the government in Phase III of the study was released just before it was most needed. It contributed to useful debates in the Legislative Council, as well as changes of assessment policy by the government (Hong Kong Institute

of Education 1999). The government accepted the recommendations to simplify assessment guidelines, introduce a reporting system to reduce the pressure on teachers, and emphasize the important contribution of feedback from assessment to teaching and learning. With regard to the most controversial issue — linking TOC assessment with the system of secondary school place allocation — the government adopted the recommendation that schools should have the discretion to use formative assessment as encouraged by TOC for up to twenty percent of total scores of pupil performance for the allocation exercise.

## **CONCLUSION**

The above analysis has exemplified some of the experiences of evaluating a large-scale curriculum reform. The conflicts, dilemmas and trade-offs arising from the political, methodological and professional issues of the study had interrelated implications for the notion of evaluation as worthwhile research to inform decision-making. These included the questions of: public, personal and organizational accountability positions; appropriate sources of long-term funding for longitudinal research; the desired impact on reform policies; the need for professional evaluators in the central agency rather than relying on academics; and ethical considerations in all research processes especially in reporting. A more important lesson we have learnt from this evaluation is that evaluation studies have the potential value of helping policy-makers to improve policy measures, schools to reform for more effective teaching and learning, and teachers to enhance their professional development, and ultimately pupils will benefit.



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