

2-6-2003

# Education Policy Analysis Archives 11/05

Arizona State University

University of South Florida

Follow this and additional works at: [http://scholarcommons.usf.edu/coedu\\_pub](http://scholarcommons.usf.edu/coedu_pub)

 Part of the [Education Commons](#)

---

## Scholar Commons Citation

Arizona State University and University of South Florida, "Education Policy Analysis Archives 11/05 " (2003). *College of Education Publications*. Paper 417.

[http://scholarcommons.usf.edu/coedu\\_pub/417](http://scholarcommons.usf.edu/coedu_pub/417)

This Article is brought to you for free and open access by the College of Education at Scholar Commons. It has been accepted for inclusion in College of Education Publications by an authorized administrator of Scholar Commons. For more information, please contact [scholarcommons@usf.edu](mailto:scholarcommons@usf.edu).

# Education Policy Analysis Archives

Volume 11 Number 5

February 6, 2003

ISSN 1068-2341

---

A peer-reviewed scholarly journal

**Editor: Gene V Glass**

College of Education

Arizona State University

Copyright 2003, the **EDUCATION POLICY ANALYSIS ARCHIVES**.

Permission is hereby granted to copy any article if **EPAA** is credited and copies are not sold. **EPAA** is a project of the [Education Policy Studies Laboratory](#).

Articles appearing in **EPAA** are abstracted in the *Current Index to Journals in Education* by the [ERIC Clearinghouse on Assessment and Evaluation](#) and are permanently archived in *Resources in Education*.

---

## **Continuing Education Reform in Hong Kong: Issues of Contextualization**

**Chris Dowson**

**Hong Kong Institute of Education**

**Peter Bodycott**

**Hong Kong Institute of Education**

**Allan Walker**

**The Chinese University of Hong Kong**

**David Coniam**

**The Chinese University of Hong Kong**

Citation: Dowson, C., Bodycott, P., Walker, A., and Coniam, D. (2003, February 6.) Continuing education reform in Hong Kong: Issues of contextualization, *Education Policy Analysis Archives*, 11(5). Retrieved [date] from <http://epaa.asu.edu/epaa/v11n5/>.

## **Abstract**

Following initiations in educational reform that began in the 1990s, Hong Kong continues to experience considerable pressure for educational reform. On the surface many of these initiatives parallel reform policies/movements in Asia and indeed, globally. The success of any reform is dependent on how it is contextualised prior to and at implementation. In this article, an exploration is made into how reforms in four particular areas, namely: professional development of principals, higher education, English language standards, and inclusion of students with learning difficulties have been conceived, contextualised and managed in Hong Kong, as it moves gradually toward increased adoption of education reforms. These areas are linked in that each describes and critiques contextualization with reference to areas such as accountability, co-operation and professional control.

## **Background to the Continuance of Education Reform in Hong Kong**

Since the early to mid-1990s, Hong Kong, like many societies throughout the Asia-Pacific Region and beyond has been engaged in continual educational reform. The reforms cover almost the gamut of educational levels and issues. Reforms over the last decade have left few areas of education untouched. For example, they have included language teaching and learning, improving teacher quality, curriculum development, special education and various approaches to school-based management. The most recent reform initiatives are driven by the Blueprint for the 21st Century (Education Commission, 1999.), which sets the overall aims of education and maps a framework for reforms. The key elements in the Blueprint center around:

- expanding the opportunities for education and build a lifelong learning society
- introducing flexibility, diversity and choice in the system to accommodate individual differences and develop potential to its fullest
- creating an aspiring learning environment so that students are intrinsically motivated to explore and learn on their own
- introducing multi-dimensional assessments to encourage all-round development
- empowering frontline educators and enhancing the professionalism of principals and teachers.

Such efforts are focused directly on improving teaching and learning. The immediate tasks include the upgrading of language proficiency, enhancing school leadership and the professionalism of teachers, broadening access to education, and building flexible pathways for professional development. In short, recent and current reforms target increased decentralization, raising standards, increased accountability, equity and the building of professionalism. These efforts are just part of a very crowded educational reform environment in Hong Kong—one which influences educators at all levels.

The reforms introduced are, on the whole, typical of the educational reform environment in many countries in the Asia-Pacific region. Despite the vast social, cultural and political diversity of the Asia-Pacific Region there appear to be a cluster of reforms which seem remarkably similar, at least in espoused intent, across the region. These reforms say the right things and promise much. However, it is suggested that the success

of any reform is dependent not on its rhetoric or its shape but how it is "negotiated" and implemented within a particular system or school.

In the following sections we will briefly explore how important reforms in Hong Kong have been conceived, contextualised and managed. The four reforms covered are:

1. The professional development of school principals
2. Higher education
3. English language standards
4. The inclusion of students with learning difficulties

Each section will describe and discuss (the process or content) of contextualisation with reference to areas such as accountability, co-operation and professional control.

## **Professional Development of Principals (PPD) in Hong Kong**

Recognition of the key role of the school principal in education reform has grown substantially over the last decade or so. Such interest, at varying times and rates, is apparent in almost all societies in East and Southeast Asia. Educational reforms either targeting the role of the principal or areas that have an influence on this role are increasingly common. Accompanying such interest in the principalship are concerns that principals are unlikely to be able to play the role demanded of them unless they have the appropriate knowledge, skills, attributes and values required of reforming schools (Walker, Begley & Dimmock, 2000).

The reforms that continue to have the greatest influence on the role of the principal in the region are decentralization and the move toward school based management. Such reforms generally encapsulate school restructuring; school-based curriculum development; school development planning; increased teacher and parent involvement in decision-making and the formation of school councils. Other aspects may include delegated budgeting and human resource management; centralized curriculum planning using a learning outcomes framework; increased accountability to the central bureaucracy; increased parental choice of school; and greater competition between schools for students.

The gravity of these reforms has spawned considerable interest throughout the region in ways to help principals meet the emerging challenges of their role. For example, in Taiwan, Lin (2001) states, "reinventing schools requires exceptional school leaders—such leaders require a commensurate level of support and professional development to make the required role shift and, in many cases, this has not been forthcoming. This casts some doubt on whether they can adopt the new roles" (p. 8). In Japan, Muta (2000) comments, "The leadership and management skills of school principals are indispensable, but the current requirements for those positions are very strict, making it very difficult to find qualified persons" (p. 464). He adds "...some questions exist as to whether the principals can carry out such non-traditional tasks" (p. 464). In Hong Kong, Cheung (2000) expresses similar sentiments thus:

Hong Kong principals face an uncertain, constantly changing and rather stressful future. Many are indeed over-worked as they face wave upon wave of reform initiatives. Additional responsibilities without adequate resources have made the role changes much more painful than necessary. How to find

more room and time for principals to metamorphose into a new breed that can lead Hong Kong's schools triumphantly into the new millennium is an issue that needs pondering and concern by both authorities and the principals themselves. (p. 62).

Almost identical concerns in the UK and various states in the US and Australia have led to a proliferation of principal and leadership centers and subsequent increases in "training" opportunities for school principals. Regional societies have also publicly recognized that if schools are to change and improve, especially in an environment of decentralization and school-based management, then principals must be equipped to deal with uncertainty and actually lead, not just manage.

Policy makers in Hong Kong have recently moved to promote the further professional development of principals. Although the rhetoric of principal training and development has been present in Hong Kong for almost 10 years, little of any substance has actually been provided, except to small, targeted groups. On the whole, Principal Professional Development (PPD) has been a *loosely* structured and carried out on an *ad hoc* basis. In the main, its content and mode of operation has been decided and guided by the institutes of higher education; often based on their expertise rather than the needs of the principals themselves, or the reforms they are intended to implement. Alternatively, PPD courses have been prescribed by the Education Department and geared largely toward the technical/managerial skills considered necessary to run a school. However, recent moves by the Education Department (ED) have begun to lay a framework for a more holistic and coherent approach to principal development.

In January 1999 the Education Department established a task group to look into the training and development of school heads. This group developed a tentative program and framework "to equip and develop school principals with the necessary knowledge, skills and attributes to become competent leaders to lead schools into the new millennium" (Cheng, 2000, p.68). In the resultant consultation document Leadership Training Program for School Principals the group proposed the following objectives for program participants. These were to:

- assess personal leadership potential for further training and development
- increase understanding of the critical role of a principal in the development and maintenance of effective schools
- improve skills in strategic planning and implementation processes
- understand global developments and their implications for education and the school
- shape a personal vision for leadership and continuous development

While the consultation document was generally positively received, some interest groups expressed reservations about certain recommendations. These reservations included the difficulties instituting a "uniform" program for all principals (and potential principals) and the requirement that serving principals obtain a "certificate of principalship" by a set date. In reaction to these and other concerns, a second consultation document was released in February 2002. The consultation paper was entitled Continuing Professional Development for School Excellence (Education Department, 2002). This document presented a coherent framework for principals' professional development - one that aimed to meet the needs of Hong Kong practicing and aspiring principals at various stages of development.

## **Link to reform**

The development and release of the two consultation documents and the promise of resources to support PPD by policy makers signaled recognition of the link between principal professional development and the successful implementation of educational reform in Hong Kong. In many ways, the consultation documents can be seen as the single most important move toward recognizing and systematizing principal training and development to come out for many years. As such, the initiative attempted to address a number of major concerns that have undermined previous efforts. Perhaps the most serious concern addressed by the emerging PPD policy was the lack of coherence and connectivity previously evident *between* and *within* the various components of PPD across levels. According to the document, PPD must target three distinct groups—Aspiring Principals (AP), Newly Appointed Principal (NAP) and Serving Principals (SP).

Linkage between the three levels is proposed through what the document refers to as the *Six Core Areas of Leadership*. These key areas of the principalship are common across the three levels of the principalship, although coverage and depth depends on the level. Attempts are also in train to build-in coherence between levels in terms of courses and other mechanisms. Linkage within levels is addressed through the inclusion of needs assessment, designated intensive and ongoing courses (partly based on outcomes of the assessment) and a certification processes. For example, according to the new policy, Newly Appointed Principals (NAP) begin their professional development by completing a needs assessment which is used, in turn, to inform group professional development offerings and individual development plans. Similar approaches are in-train or planned for APs and SPs.

## **Issues**

Although there is no doubt that the current policy is a very positive forward step, a number of implementation issues hold the potential to impede the efficacy of the policy and accompanying programs. A first issue may be the number of different providers involved. Although this does not present a difficulty *per se*, it is obviously healthy to include multiple providers playing to their strengths, problems may arise if these providers disregard the established framework, or ignore the intended linkage between the needs assessment and designated programs, and design their inputs only in terms of their own interests. Such actions could weaken the effect of all the interrelated components and return principal professional development to its traditional fragmented and decontextualized roots. Another related articulation difficulty might arise between offerings and mechanisms for various groups of principals. Given that the framework divides principals into three groups, there appears a need to impose more stringent quality assurance mechanisms to prevent duplication and ensure relevance.

A further implementation blockage is that the current professional development initiatives are not linked to principal recruitment or selection. Aspiring principals and school governing bodies may not take PPD seriously if it remains de-linked from actually applying for and winning a position as principal. Unless principals and aspiring principals see a clearer, pragmatic purpose to professional development, such as selection or articulation to further degrees, the PD offerings may not be valued, or

effective. Although it is hard to avoid, at the personal level there is also a danger of a lack of coherence, if insufficiently motivated individual principals engage in professional development in a very shallow manner.

How, why and where programs are conceptualized and developed may also hinder effective implementation. In many instances, there appears a continued, over-reliance on higher education institutions knowing what is best for aspiring and serving principals. Hence, although policy makers may reinforce relevance in terms of rhetoric, in reality, local providers (or individuals within certain organizations) may continue to develop professional development programs based on their expertise and ideologies rather than on what principals want and need to implement reforms. A result of this can be that offerings are overly formal (e.g. restricted to formal face-to-face courses and workshops), too practically biased (with little intellectual input) or, more often than not, overly theoretical and detached from the lives of principals. Such charges, unfortunately, are not uncommon in PPD programs where designers too often ignore the fact that much of what principals do is context specific, and that simple formulas, models or recipes distinctive to each context are not readily replicable. Until universities and other providers establish meaningful partnerships with principals at all stages of professional development there may well be continue to be a sizeable gap between offerings and the real life of schools.

A further blockage to the successful implementation of PPD in Hong Kong is the continued homage paid to overseas theories, presenters, frameworks and ideas, particularly English and American models (Walker & Dimmock, in press). As in many societies in the region, there is often an over-reliance on Western, mainly Anglo-American theory, values and beliefs in terms of overall policy adoption and in many areas of education. In terms of principal's professional development, unconsidered adoption can hamper the meaning of the program content for participants and influence its design, structure and even presentation. Although cross-fertilization of ideas and approaches is generally positive, there may not be enough recognition that theory, practice and imported expertise is often culturally insensitive or inappropriate. In short, it is difficult to see how PPD can be relevant if it depends almost exclusively on people and ideas located in very different contexts and cultures. One way to counter such a difficulty is to institute feedback mechanisms that provide local professionals (principals) with opportunities to comment, shift and adapt imported offerings to local needs. An even more effective mechanism is to ensure that programs respond to local needs as identified through systematic needs analysis.

Another implementation blockage relates to the political/micro-political environment within which professional development takes place. In many ways, this is related to the issues of coherence and continuity noted earlier. Historically, Hong Kong has practiced an established tradition of "sharing" out the provision of professional development to the various, relevant higher education institutions. Although unarticulated, this tradition has been based on a "keep everyone on-side and happy" philosophy. Such practices are antithetical to quality PPD and emphasize political rather than content/delivery concerns. Petty jealousies and competition between academic institutions can upset the intent and implementation of professional development. While concerns focus on matters other than the relevance and quality of professional development opportunities and provision, the efficacy of PPD may be questioned.

Finally, the implementation of PPD in Hong Kong may also be blocked by its lack of a

"hard edge." In other words, the standard of accountability mechanisms may be inadequate both in terms of the principals involved in the process and for the providers. For example, there are no obvious mechanisms to gauge the effect of the professional development on leadership actually in the school. Neither are there stringent requirements for providers to show that their outcomes have in fact been achieved. Although the emerging policy is attempting to address this issue, particularly through the needs assessment process, it has some distance to go.

Recent policy then, is aimed at the professional development of aspiring, new and serving principals in Hong Kong holds previously unequalled opportunities to build principal professionalism. The scope of the changes calls for a marked shift in culture in terms of how principals, providers and the system perceive and operationally PPD. At it's most basic level, the new policy requires a change in mind-set—away from the belief that principals do not need to learn, or learn by osmosis. For principals to successfully reshape their role they must have access to meaningful professional development. For such development to become relevant and offer any chance of real change it should be developed in concert with principals themselves and be adequately resourced and rewarded by departments and ministries of education. It should also be linked closely to the reforms principals are expected to implement and shaped to form a coherent program rather than the piecemeal, fragmented attempts that comprise the norm.

Much of the responsibility for making professional development meaningful, of course, lies with principals themselves and their willingness to take some control of their own destinies. Although the emerging PPD policy holds much promise, it faces a number of fairly major hurdles if it is to be implemented in a way that truly benefits principals and cajoles them toward greater professionalism and reform.

## **Teacher Education Reform: The Challenge of Contextualisation**

Over the past 25 years there has been an explosion of knowledge about brain development, cognition, learning theory and their relationship to student motivation and achievement (Lynch, 2000). In Hong Kong this knowledge has gradually made its way into educational reform documentation that posed and continues to pose significant challenges to the way the curriculum is structured and the ways children are taught. The challenge for teacher educators is to figure out how to incorporate new knowledge, required by reform initiatives, in to our teacher education curriculum, in order that new teachers understand how ultimately to advance student achievement in their classrooms. This is a difficult task, made more difficult in Hong Kong by reform initiatives that apparently contradict one another, and by a school system that does not necessarily welcome students well versed and skilled in new approaches to learning, teaching and assessment, or equipped with a notion of professionalism, which includes the right to question existing practice.

In this section of the paper it will be argued that a paradox exists between the requirements of reform and the needs of schools. This paradox places, for one institution specifically, undue political demands and expectations on the teacher education curriculum, teacher educators and student teachers. It is also argued that to overcome the apparent paradox, teacher education curriculum reform is required in which issues of contextualisation are addressed.

## The Reform Context

Recently released education reforms (Education Commission (EC) 2000) comprise wide scale changes to all sectors of education in Hong Kong. The reforms encompass a broad vision based on the principles of learner-centered education and related changes to the curriculum, modes and focus of instruction, assessment opportunities, whole-school management, enhanced professionalism, and opportunities for lifelong learning. The reforms also embrace the worldwide trend toward accountability through standard-based assessment. Inherent in the reforms are recommended changes or modifications to all stages of education: Early Childhood to Higher Education and Continuing Education. More substantial than the mere scope of reform is the depth of reform, which strikes at the ideological heart of education in Hong Kong. The reforms are summarized in the following five principles.

- Learning should be focused on students' personal development and allowing room and flexibility for students to be masters of their own learning.
  - There should be no "dead-end screening" to block learning opportunities. Learners should be given due recognition for what they achieve.
  - Access should be provided and means sought to ensure learners realize their potentials. "Everybody should achieve basic standards and strive for excellence."
  - Learning should not be limited to school subjects or examination syllabuses, students should be prepared for the realities of life
  - All sectors of the community are expected to contribute to the reforms.
- (EC, 2000)

It is clear that the reforms aim at improving teaching learning standards and accountability across all stages of education through changes and improvements in academic structure, curriculum, and instruction and assessment mechanisms at the various levels. However, while several of the reforms, such as the development of technological expertise and meeting the needs of diverse learners appear compatible with general developments in higher education and school curriculum, other aspects appear to contradict one another, e.g. learner-centered teaching based on a premise of teaching for understanding and standards-based assessment. In addition, there are problems associated with competing ideologies and related perceptions of educational aims and practices between policy makers, and policy implementers, (which are the schools). These apparent contradictions and differences of opinion raise serious questions regarding contextualisation.

The reform documentation clearly acknowledges a desire to shift classroom instruction away from the transmission of knowledge to learning how to learn i.e., establishing a new culture of learning and teaching. However, questions must be raised about contextual or cultural relevance of such a movement. For modern Chinese, Confucianism remains a critical element in their cultural identity (Chan, 1999). Closely linked to this is a traditional view of the teacher as authoritarian and one whose role is that of transmitting knowledge through instructional methods such as rote and repetitive learning. Such methods are reinforced by an emphasis by the teacher and parents on demonstrable knowledge achievements in the form of test score attainment. Therefore, to propose educational reforms that clearly contrast with firmly established cultural styles of learning and teaching, through assertions such as "the fostering of learning

abilities [to be] more important than the imparting of knowledge" creates something of a educational paradox; to marry the needs of continuous change through reform and innovation on one hand to an educational system that fundamentally rewards conformity and orthodoxy on the other. In Hong Kong, politics also plays a significant role in deepening the paradoxical gap between preparing reform-savvy beginning teachers and the contextual reality of schools.

Contextualisation in respect to teacher education and general education reform is defined as the negotiation and adaptation of a policy, programme or curriculum approach for a more meaningful fit to the values, norms and structures of a host culture or organization (Bodycott, in press). The concept and more importantly the issues arising from its application pose one the greatest challenges for any teacher education institution intent on creating and maintaining change.

## **Contextualisation and Teacher Education in Hong Kong**

Higher education in Hong Kong refers to all learning opportunities above secondary school level. This includes post-secondary school colleges, universities, extra-mural departments of universities, non-local tertiary institutions and the Hong Kong Institute of Education (HKIEd), a teacher education facility and itself a successful product of EC Report 5 in 1992, and the main source of primary school teachers for the HKSAR.

The challenge and associated problems posed to teacher education institutions by the reforms in respect to curriculum; instruction and assessment are similar to those discussed generally above. That is, not to confine curriculum to the transmission of knowledge and skills, but to provide students with training in aspects of culture, emotion, moral conscience and mentality. Specifically, the reform recommendations require all higher education institutions to "review the functions, contents, focuses and modes of teaching... to strike a balance between the [content] breadth and depth" (EC, 2000, p. 113). Higher education must provide learning experiences and opportunities to "develop-broad based knowledge and vision, as well as enhancement of individual students problem- solving power and adaptability" (EC, 2000, p. 111). Hong Kong institutions of higher education are being challenged to rethink their whole approach to curriculum and instruction.

## **Pedagogical issues**

The reforms also constitute for teacher educators theoretical and pedagogical dilemmas based on the incongruent principles of reform and their explicit emphasis on student-centered approaches to teaching and learning on the one hand, and the sustained emphasis on standards and outcomes assessment on the other. The problem becomes professionally challenging when dealing with an overt clash of philosophical ideals—standards-based accountability and liberal-humanist values and the translation of these into programmes of instruction that meet the contextualised needs of schools and general education (Helsby, 1999). The "imposition" of standards- based accountability locks teachers into a mode of operating in schools, no matter what efforts are made to reform or shape it (Apple, 2001). In colloquial terms, teacher educators in Hong Kong are metaphorically, caught between a rock and a hard place. The reforms charge teacher educators with the responsibility of creating "pillars of society" who are both "generalists and specialists" who will have high standards of academic knowledge

and language skills, and who (as beginning teachers) are entering a school system in a time of rapid reform.

## **Politics, Reform and Paradox**

In Hong Kong an undercurrent of concern exists relating to the politicization of the reforms and specifically their direct effect on teacher education. If anyone was to question the importance placed on the teacher education in respect to the latest reforms, then they need look no further than to the level and tone of language used to describe their role. Higher education is seen to be "the key" and has "the duty" to be the gatekeepers of among other things student language proficiency attainment. The reform documentation describes the move toward exit standards of language proficiency. Such language and initiatives firmly position the current reforms alongside similar global trends aimed at national standards for teachers e.g., in the United States and in Australia. But in these countries such movements are based largely on economic trends and questionable motives and place extreme pressure on providers of teacher education. Whatever the political motive, the reforms and in particular the emphasis on outcomes-based performance assessment and the associated high stakes tests for graduating language teachers in Hong Kong has already exerted a considerable influence, albeit not always positive, on teachers and teacher education students, and higher education teaching, curriculum and teacher education agendas.

Currently in Hong Kong the majority of newly trained primary teachers are provided by the HKIEd. Two major universities compete with the HKIEd for this substantive market. However, an inequity exists between the universities and the HKIEd, which is compounded by the paradoxical relationship between reforms, teacher education and schools. Specifically, issues arise concerning the role and status of the HKIEd and its ability to prepare teachers for the contextual reality of Hong Kong schools, to "compete" for student numbers and the necessity for it to demonstrate programme conformity to government reform directives. These issues, as summarized in Bodycott, (in press) include:

The status afforded HKIEd where in an elitist educational context is yet to be awarded "university" status, which affects the level of clientele attracted to programmes of teacher education at HKIEd compared to other "university" education faculty programmes. HKIEd and teaching tends to attract students who are generally of lower academic standard than those entering for study at "universities." Therefore the impact of the unstated competencies and "university standards" expected of all graduating HKIEd students is far greater given their entry level.

Secondly, the requirement of the HKIEd to have full details of all programme content and management validated for rigor and general quality by external parties including international subject and curriculum experts and local academics from "university" faculties. These validations require the HKIEd to defend all aspects of design and management and in particular how the programme reflects government reform initiatives. No other teacher education faculty in Hong Kong is required to divulge such programme detail or justify relevance and relationship of specific teaching philosophy and subject content to government reform directions.

Thirdly the perceived need of government and the community to criticize education in

general and the HKIEd specifically for failing to deliver students and beginning teachers who are academically, socially, spiritually and morally fulfilling of their, at times, unrealistic expectations.

Lastly the reforms create inequities in the provision of teacher education. University faculties of education via their status exercise liberties in respect to programme design and the degree in which government reform initiatives are addressed, whereas HKIEd programmes by virtue of its "non-university status" must conform to government reforms. The paradox here is that schools criticize the graduates and their programmes of instruction for not being compliant with the current pre-reform specific needs of schools.

## **Transforming Teacher Education**

Current reform requirements and expectations imposed on higher education in Hong Kong presents teacher educators and their students with what many find almost insurmountable challenges. Firstly, to meet the contextualised demands of reform teacher educators must themselves be capable of personally and professionally dealing with change and with the inherent ideological and pedagogical incongruence associated with reform. Secondly, assuming teacher educators can personally cope with such challenges they then must have or develop the professional ability to transpose their understandings into programmes of instruction that can in some way challenge the existing beliefs, attitudes, values and practices of students. To meet such personal and professional challenges it is proposed that there must be a significant change in the nature of teacher education. At present, missing from the reform agendas in Hong Kong and elsewhere is a view of teacher education that encompasses a "change agency" (Fullan 1993). That is, time must be given within teacher education programmes to overtly prepare teachers and teacher educators to be effective agents of change.

Preparing teachers to be agents of change is decidedly not the focus of current teacher education in Hong Kong, nor importantly is it necessarily desired by future employers. Principals, despite educational reform initiatives, do not necessarily want new teachers to enter their schools questioning existing practices, or reflecting and acting responsively to the culturally relevant academic needs of differentiated learners and by doing so upsetting the status quo. Frequent criticisms by Hong Kong principals of beginning teachers, and especially those from the HKIEd, is that they are under-prepared, unprofessional and lack classroom management skills (criticism based on the noise-levels generated in classrooms), and lack the subject- knowledge to adequately prepare students for high stake tests.

The contextual reality is that generally Hong Kong principals do not want teachers to question whose interests are being served and met by school policy, or by the curriculum and its reliance on textbook teaching and test preparation. Nor do they want beginning teachers who may question the failure of the school to adhere to principles such as whole person, no loser, broad-based knowledge and learner-centered approach to education, as presented in the current education reform documents. Such knowledge of schools and the contextual challenges of teaching in Hong Kong are bound to have far reaching effects on the long term transformation of curriculum or practice and the design and effectiveness of any teacher education programme.

## Placing Context to the Fore in Teacher Education

To have face validity, teacher education programmes must be contextually authentic. That is, students must be required to undertake a programme of study and teaching experiences that relate directly and authentically to the context of schools and the classroom. Such a belief is grounded in experience and the literature (for example see Lynch, 2000) which advocates the when students are taught in active, engaging environments, and are allowed to put the knowledge in to practice by demonstrating its application in some way, then they will come to understand more, retain more, and apply their knowledge more in various learning contexts. Such instruction Howey (1998) labels as "contextual teaching and learning (CT&L)" which is defined as:

Contextual teaching ...enables learning in which students employ their academic understandings and abilities in a variety of in- and out-of-school contexts to solve simulated or real-world problems, both alone and with others. Activities in which teachers use contextual teaching strategies help students make connections with their roles and responsibilities as family members, citizens, students, and workers. Learning through and in these kinds of activities is commonly characterized as problem based, self-regulated, occurring in a variety of contexts including the community and work sites, involving teams or learning groups, and responsive to a host of diverse learners needs and interests. Further contextual teaching and learning emphasize higher-level thinking, knowledge transfer, and the collection, analysis, and synthesis of information from multiple sources and viewpoints. CT&L includes authentic assessment, which is derived from multiple sources, ongoing, and blended with instruction. (pp. 19-20)

A contextually authentic teacher education programme would consist of the following features:

- The standards for excellence in teacher education would be clearly articulated and addressed specifically to students throughout their programme.
- Emphasis would be placed on developing the individual skills and qualities of students through an acknowledgement that reform or change is a highly personal process with no guaranteed outcome.
- Grounded in a personal-social-constructivist view of knowledge and skill formation, reform initiatives are channeled through contextualised tasks and activities designed to facilitate challenge to each individual students personal and professional constructs of teaching and learning. Through such a process, knowledge (theory), values and practices are analyzed and critiqued for what they actually mean for the student personally and in respect to the contextualised realities of classroom instruction, teaching and learning and other aspects of teachers work—policy formation, curriculum development, assessment and reporting.
- Therefore the development of reflection would be more than a rhetorical component in the programme design.
- A focus on assisting students to develop an understanding of the synergistic nature of theories in practice, of professional partnerships with fellow stakeholders in the education endeavor, of reflexive thought and action and the often incongruence of

educational vision and contextual reality.

- All teachers would be expected to operate as reflective practitioners and thereby work collaboratively in learning communities and demonstrate that their teaching leads to increased student achievement (Cochran-Smith, 2001).
- Students would ultimately be expected to present themselves publicly, to justify the decisions they make in respect to teaching and learning to various stakeholders in the education process. These stakeholders include parents, teacher colleagues, the principalship, school benefactors and the children themselves;
- Authentic assessments are implemented that require students to actually perform certain learning tasks, thereby demonstrating their skill and understandings and an ability to apply what they have learned (McTighe, 1997). Such assessments require students to perform the assessment in a manner in which stakeholders wish them to perform in the classroom. In so doing, students are required to focus on higher levels of cognitive complexity (Gipps, 1995).
- Success would be determined through an evaluation of how well the programme content, assessment tasks and associated experiences reflect the real-world of the classroom.

Contextual authenticity in programme design and delivery would provide students with the best possible teacher preparation and the education community with teachers who are well-versed and skilled in the needs of the profession and the schools and children in the community and culture in which they are to serve. In a contextually authentic programme, students are placed in situations that require the application of knowledge and skills together with guided reflection and constructive feedback, as opposed to more traditional teacher preparation programmes that place greater emphasis on the recognition of subject content and reproduction of correct answers.

The roots of contextually authentic teacher education are grounded in theoretical principles of humanism and constructivism, which ensures students are "in touch with their own landscape" (Greene, 1978, p. 39). Contextually authentic teacher education embraces other theories and terms used by learning theorists—such as experiential learning, real-world learning, active learning, learner-centered instruction, and action learning—all of which are frequently quoted in reform documents if not observed in classroom practices.

The extent to which such principles influence the design of teacher education programmes will vary according to culture and education context. For example, if the agreed focus of education is mastery of techniques or demonstration of specific competencies, then teacher education programmes will need to be designed to transmit the required knowledge and in so doing prepare their prospective teachers in accordance. Similarly, if the focus or aim of education is for teachers to be more critical, reflective thinkers and practitioners—as in the current Hong Kong educational reforms—then prospective teachers must have opportunities to learn how to explore the world of teaching and education from a reflectively critical perspective. In so doing, they would be required to find their place within such a landscape before expecting their students to do so.

To be contextually relevant, teacher education must prepare prospective teachers to negotiate the blurred and somewhat contradictory realities of curriculum policy and school-based practices. Students must be prepared to prove themselves competent in their first time teaching positions while at the same time be prepared to challenge some

of the assumptions and actions that other teachers and principals take for granted. It is believed that contextually authentic teacher education programmes would influence the students and schools affectively. When students and the school community perceive programmes as having personal and real-world "contextual" relevance they are more likely to feel positive about the programme and thus put more effort into it, and consequently principals would be more willing to employ teachers who graduate from it.

Unfortunately the most recent reforms in Hong Kong like many before them, may well be ignored, or even lost if apparent ideological contradictions are not addressed. Simply, beginning teachers confused by the competing ideological expectations and rewarded by outcomes-based incentives in their schools may simply choose to maintain the status quo and teach the way they have always taught (Bodycott, in press). While it is relatively easy for governments to formulate and initiate reform policies, the true test of their applicability comes at the implementation level (Walker, in press). The contradictory nature of the current educational reforms in Hong Kong place higher education in general and teacher educators in particular in an invidious situation. For in an era of high contextual expectation they are charged with preparing new and in-service teachers for schools, where curriculum and instructional visions are not aligned with cultural and contextual expectations regarding teaching, assessment and accountability. With government unlikely to change their educational reform focus, despite the irregularities, the answer for Hong Kong at least, lies in part with the development of a more contextualised approach to teacher education.

## **English language teacher standards**

Standards of education in Hong Kong have been a cause of concern since education's early days (Bickley, 1997). It was really in the late 1980s, however, that the language standards of teachers in Hong Kong, particularly teachers of English, became an issue of general concern. The business community (Au, 1998; see also Choi, 1998), in particular, felt that English language standards were dropping among the workforce. This was worrying because higher standards were required as commerce moved from a predominantly light-manufacturing base to a service-led economy, one that dealt with the world on a regular daily basis through the medium of English. (It should be noted that the establishment of teacher language benchmarks has not been not the only measure to improve standards of teaching and learning: there have been a number of commendable initiatives designed to improve the curriculum and examination systems in Hong Kong—Falvey and Coniam, 2000).

Mindful of concerns about standards, the Hong Kong Education Commission (1), in December 1995, published Education Commission Report Number 6 (ECR6). The Education Commission highlighted a number of areas for action in this report, one of which concerned teacher competencies, in particular the upgrading of *teacher* language standards. The establishment of language "benchmarks" (i.e., minimum standards of ability in language) was recommended for all teachers in Hong Kong (there are approximately 42,000 primary and secondary school teachers, of which approximately 12,500 are English language teachers) on two fronts. The first concerned language teachers, that is, teachers of English, Chinese and Putonghua. The second concerned teachers who teach content subjects (history, geography, biology, mathematics etc.) through the mediums of either English or Chinese (see Falvey and Coniam, 1997).

As a follow-up to the recommendations in ECR6, an investigative consultancy study (Coniam and Falvey, 1996) was commissioned in early 1996 to investigate the feasibility of establishing language benchmarks, initially for lower secondary (i.e., Grades 7-9) teachers of English (2). Following on from the consultancy report, steps were then taken to develop the recommendations of the consultancy report into government policy. The first, and most important step in developing policy, involved the creation, in late 1997, of a widely representative English Language Benchmark Subject Committee (ELBSC). The ELBSC was composed of the main stakeholders involved in English language education in Hong Kong—language teacher educators, members of the Hong Kong Education Department, the Hong Kong Examinations Authority, school principals, department heads, practising teachers and members from ACTEQ itself. The body, which was excluded from the ELBSC, was the Teachers' Unions—a move that had repercussions later when the benchmark policy was formalized and publicized.

## **Process**

The ELBSC worked together or in sub-committees over the period 1997-2000 agreeing on assessment constructs, establishing specifications, designing exemplar tasks, creating scales and descriptors for criterion-referenced task assessment and monitoring the piloting and moderation of the assessment instruments. The work of the ELBSC culminated in the recommendation of a benchmark examination consisting of battery of "formal" tests (i.e., Reading, Writing, Listening and Speaking), as well as a performance test of Classroom Language, where teachers would be assessed teaching two of their own classes in their own school.

Following the work of the ELBSC, the HKSAR Government publicized the introduction of language benchmarks in mid-2000. The policy document stated that pre-service teachers would, from September 2001, have to be benchmarked before joining the teaching profession. In-service teachers, i.e., established serving teachers, would have until 2005 to meet the prescribed benchmarks. It is important to note, however, that the Government's drive to set a minimum standard of language proficiency did not reside solely in a test of teachers' language ability. In addition to the administration of the benchmark assessment, substantial financial resources were allocated so that every teacher of English could enroll on a language enhancement programme of up to a maximum of 200 hours (3).

It is worthwhile briefly examining the benchmark performance test—the Classroom Language Assessment (CLA) test, due to its innovative nature, the demands it places upon teachers and their expectations of the test. The CLA was discussed at length in the ELBSC because it would be a performance-based test that would take place in a live taught class. As Sanaoui (1999) notes, the essence of attempting to define what is fair, yet what also needs to be assessed in a performance test such as the CLA, lies in the form and manner of the assessment being determined "by consensus" across a group of informed stakeholders. The composition of the ELBSC, with teachers, principals, ED members and tertiary institution lecturers was an attempt to reach an "informed consensus." While the ELBSC was very much in agreement with the philosophy behind using an authentic test, logistic concerns were expressed at the administration of a live CLA. Although English language teachers are used to paper-and-pencil tests (preparing their students for such tests in public examinations), and formal tests are an accepted

part of school culture, a live classroom test would be much more threatening. On this basis, such a test had to be carefully handled: the constructs assessed had to be broad in terms of the language skills assessed, i.e., not biased against any particular group—primary versus secondary, for example. Support for the retention of CLA was made in a 1999 Colloquium on English Language Benchmarks held in Hong Kong, where Nevo, a visiting scholar in assessment and evaluation from Israel, stated unequivocally that the inclusion of the CLA in language benchmarking should be retained in spite of inevitable arguments that it would be costly and time-consuming. His assertion rested on the proposition that CLA is at the heart of the teacher language performance being assessed (for a discussion of the CLA test, see Coniam and Falvey, 1999).

In March 2001, the first, live benchmark test for English language teachers was administered. When the results were released in June 2001, there was an outcry in the local media because of the apparently low pass rates: the headline of the South China Morning Post of June 9, 2001 stated *Teachers flunk English test*. The lowest pass rate was for the Writing Test, which 33.3% of test takers had passed.

### **Critique : Principles and problems**

A brief examination of the benchmark initiative from the perspective of its positive and negative aspects follows.

On the positive side it should be noted that the benchmark initiative is a step forward in the area of teacher professionalism. The setting of language standards is a prerequisite for able language teaching. While it is understood that good language skills themselves cannot be necessarily be equated directly with "good" teaching, if communicative language teaching—whereby ESL teachers use a considerable amount of the target language to interact with their students—then a high degree of competence in the second language is essential.

In order that greater professionalism is viewed from a perspective of *encouragement* rather than simply as a stick waved by government, without resources being available, the move becomes one, which is even more, resented. The benchmark initiative has not of course been welcomed by all teachers—some, the less able it is often suggested feel threatened by the initiative. Nonetheless, the fact that the government has allocated financial resources (a total of US\$30) for, in principle, every single teacher in the SAR is an indication of the importance the government attaches to the initiative in terms of the professional upgrading of teachers.

The test specifications, although initiated by Government were set by the consensus of a large and generally representative committee, with the omission, as mentioned above, of the teachers' unions.

On the negative side, as might be expected with a large- scale government initiative, the time frame has been, to say the least, unrealistic. From the initial moves with the 1996 consultancy study, the first administration of the first examination took place in 2001. This five-year lead- in contrasts with major syllabus revision in the case of public examinations, where in Hong Kong at least, a 7-year lead-in is the norm.

The insufficient time frame has also meant that all test types have not been trailed as

extensively as they might have been—resulting in outcry from teachers and teachers' unions after the first administration in 2001. The exclusion of the largest teachers' union, the Professional Teachers' Union (PTU), resulted in initial work being completed without major agreement. That said, the hurdles were then even more difficult to surmount because of the earlier exclusion of the PTU. Sanaoui (1999) notes that for acceptance of an initiative to be embraced, the investigating body must comprise all stakeholders. The fact that pass rates were low in the first live administration of the test may in part be ascribed to the lack of readiness for the test among test takers. In order to pass the benchmark test, however, the ELBSC recommended that a pass must be achieved on every subtest. While this, in essence, was a laudable recommendation, in that it was intended to help "raise standards," the initial low pass rates which were very poorly received by the media did not raise much public sympathy for teachers. Further, it is argued that such a stipulation (i.e., having to pass every subtest) does in fact require a "minimum acceptable standard"—the original purpose of the benchmark initiative—but demands a higher than "minimum" standard (see Coniam and Falvey 2001 for a discussion).

Further, goalposts changed as the initiative developed: at first it was decided there would be no exemptions from the test. The publication and public promulgation of the test specifications in mid 2000 resulted in a lot of opposition. In an attempt to pacify the some of this opposition, an investigative panel was set up, which did then recommend exemptions.

A final point concerns the syllabus specifications not transparent enough—with performance tests such as CLA, print examples are not sufficiently transparent or informative. The same principles of accessibility can be found in the syllabus document produced for the English language benchmark assessment initiative. In a print document—such as that produced for the English language benchmark—specifying the exact demands of a performance test such as the CLA component is not easily accomplished. The Hong Kong Examinations Authority and Education Department have gone to great lengths to produce a detailed syllabus document. The document contains the scales and descriptors against which test takers will be assessed and contains as many exemplars of the Reading Test, Listening Test and Writing Test as was possible to put together in the limited time frame prior to publication of the benchmark tests. See Coniam (2002) for a discussion of the problems associated with a print syllabus attempting to specify the demands and requirements of an oral performance test. And an attempt to render the CLA test more accessible through a multimedia implementation.

## **Inclusion for Students with Learning Difficulties**

### **Introduction**

Current educational reform in Hong Kong includes a consideration of dealing with diversity in the classroom, and there has been a parallel growth in awareness for equity in the classroom. Ironically, there have been policies aimed at integration in place for about thirty years yet the potential for successful implementation of inclusion through good contextualisation is only just being realized. The thirty-year history of inclusion of disabled students into regular shows a slow beginning, with acceleration of this process occurring only very recently. Preparing regular teachers to deal with inclusion has been and continues to be a challenge. Preparing special education teachers for co-teaching and

supportive roles in regular education settings is equally challenging. There have been numbers of more recent official recommendations, for example, the principles and policy objectives stated in the White Paper on Rehabilitation (HK Government, 1995), and the deliberations of the Board of Education Sub-committee on Special Education (1996), that encourage inclusion. However there are difficulties faced by regular teachers as they struggle with the concept of integration and they mostly arise through a lack of understanding of students with learning difficulties and a lack of strategies necessary to support these students in the regular class setting.

### **Patterning the integration of other countries**

Historically, many countries tried to integrate disabled students into regular schools by placing them in special classes within the schools, and this has been attempted in Hong Kong. In most of these countries this move was followed relatively quickly by the integration of individual disabled students into regular classes. This was often followed by a backlash from regular teachers who felt unsupported and unable to help such students. In Hong Kong integration is taking place at a more measured and slower pace. There are now more than sixty schools undertaking integration. Other policy reforms, for example school-based management, are introduced by way of a decree and a timeline. In fact up scaling of integration by small incremental steps is slowly taking place, and this tardiness may be a result of tensions between the Education Department and the powerful sponsoring bodies that manage and control schools in Hong Kong. Given the centralized and economically powerful position held by the Education Department of Hong Kong, it is a little surprising that reform is so slow.

### **The context of simultaneous reforms and unity of purpose**

In attempting to implement inclusion, the context of reform in Hong Kong presents a difficulty in itself. Educational reform in Hong Kong has involved the rapid introduction of various policies, with an expectation that schools, through school-based management will have independence, in deciding for themselves, the priority of introduction. In that setting, inclusion may be given very low priority and its implementation could be delayed almost indefinitely. Additionally, the contextualisation of inclusion needs to have a unity of purpose. Recent experience in the observation of the integration process and as shown in the idealized model below, indicate that all elements, from the school's values through to parent involvement must be addressed. The authority charged with funding and policy implementation may not even demonstrate such unity. For example, within that authority, while one section is responsible for the implementation of the stated policy on integration in regular classrooms, and is making an effort to promote it, another section responsible for resources might be busily enforcing rulings on the requirement for a special education unit or class in each new school. Further need for contextualisation is evidenced by the unwillingness of schools to include students with learning difficulties. As previously discussed, early recommendations for integration in Hong Kong really came from overseas precedents, and it is suggested that far more attention to local needs and significant elements would have made the implementation of integration easier and quicker.

### **School cultural context and inclusion**

Policy implementation or reform in Hong Kong often seems to experience cultural difficulties. Policies are drawn up, and publicized; yet schools are in general reluctant to take them up. Within the school, there are number of further potential cultural contextual barriers that should have been addressed. Classroom teachers without illumination may fear or resent students who are disabled or different. They may feel that they have enough "problems" to deal with, without the inclusion of "handicapped" students. Special schools may find it difficult to decentralize and integrate their services into regular schools. Inclusion has an uphill battle in the Hong Kong cultural setting, and in the school culture.

A pilot integration scheme involving more than sixty schools in which regular schools took in a small number of "integrators" with the incentive of receiving a bounty fund for each "integrator" is just beginning to show that schools may be becoming more accepting. In the scheme, This is evidence of a definite move to a more consistent approach, but it is still far from the concept of inclusion. While policy and context may be identified as key considerations in bringing about change, one very important factor is leadership. With effective leadership, aimed at the grass roots level of the school, school staff can become participatory teams. All staff can feel that they are part of the decision making in the school, and this is much more likely to lead to effective and appropriate change. Under such circumstances, there will be consensus on the schools aims and objectives, and this is most likely to come about when the school leaders and participants have a shared vision—This will give strength through unification of purpose. This is essential when it involves decisions that move a school towards a philosophy of inclusion.

In the Hong Kong context, there is increasing awareness by educators for the need for this type of educational reform. Current reform has targeted the need for dealing with diverse learners, parental involvement, student focus, a "no-loser" principle and a move away from syllabi that target examinations. (Education Commission, 1999). These types of reform initiatives can only benefit students who are included into regular schools.

However, the ability of leaders and educators to implement and support reforms remains as a further barrier to their full adoption and utilization. This resistance to change suggests that leaders and educators need two things. On the one hand they need to want to change, and on the other hand they need to feel that they have the skills to bring about change. Attitudinal change is one of the most difficult areas of human adaptation. Although schools do contain Resource Classes for "low achievers", these are carefully categorized and separated so as to preserve the status of the remainder of the school. Interestingly, since 2000, the Education Department has allowed resource teachers to work on a "non-withdrawal" in-class basis. Leaving the decision to schools though does not appear to have led to any marked change from the traditional Resource Class pattern. Enskilling people for change is a little easier. Skills to bring about change can be built up by for example, by training leaders in how to conduct workshops that target problem-solving, motivation techniques and support strategies. These can later be contextualised into programmes of staff development that will develop and harness those skills that enable staff to make decisions, to work collaboratively and to work in teams productively.

It seems that schools are never quite "ready" for inclusion, or have not thought about how to introduce inclusion into the current context. However, the reality is that if it were

necessary to wait until everything was ready before beginning inclusion, it would never happen. In an idealized model there are needs in the environment that can be attended to that greatly facilitate the inclusion process, and the more of these that are addressed the more chance there will be of a smooth contextualisation of inclusion. The needs and facilitation elements in an idealized model are shown and discussed below. (Dowson, 2001).

**Table 1**  
**Facilitating Inclusion in Hong Kong Schools**

Need	Specific Facilitation Element	General Facilitative Elements
● Inclusive school values and direction	● Leadership	Good policy implementation and continuing support
● Inclusion into society	● Publicity	Community consultation
● Acceptance by peers, teachers, and principals	● Whole school approach	School introspection
● Full classroom support	● Full funding	Good site-based strategic planning
● Competent and confident teachers	● Teacher education & support	Prioritization, task identification and implementation of ideas
● Planned initiation	● Careful preparation	Close liaison between policy-makers and implementers
● Acceptance by parents of regular students	● Contact and communication	Conversion of special education institutions to resource centers
● Early age inclusion	● School consultation	Shifts in centralized funding
● Parallel curricula	● Administration acceptance	Supportive legislation
● Included child preparation	● Parent guidance	Curriculum liberalization

In this facilitation model, inclusion reform entails consideration of a number of factors, all of which are important if optimal, and acceptable inclusion is to be attained. These factors include:

- Inclusion into society needs to be achieved through changing public attitudes toward the disabled. High quality and persistent publicity is one way this might be achieved.
- Acceptance by peers, teachers and principals requires the support of the "whole school approach." Acceptance by parents of regular students is particularly important and can be achieved by schools that, perhaps through School Management Initiatives, choose to address the issues and involve and inform parents in, for example, the move toward an inclusive school. The requirement in Hong Kong for the adoption by schools of School-Based Management makes this

more likely.

- The inclusion class environment, in which identified regular students with negative attitudes about disabled students have been helped to adjust, is also important. A "Whole School approach" would include this activity, however, such an approach in Hong Kong appears to have involved much rhetoric, but little actuality.
- In the classroom, support for included students requires considerable funding, more than the bounty funding offered to schools in the Integrated School Pilot Scheme. This can be achieved by redirecting special education funding to disabled students who have been re-sited in regular schools. Another consideration is the regular classroom teacher. Teachers need to be confident about their ability to support the learning of disabled students. As previously discussed in relation to policy recommendations, this requires in-service and pre-service teacher education. Recent teacher education programmes address these issues, however programme participants are often disillusioned when they fail to find included students in regular classrooms. Yet to facilitate inclusion, regular teachers need to be able to carry out planned initiations in the classroom.
- Inclusion will generally not occur positively unless teachers make an effort to engage the class in activities that foster it. For example in a situation where a heterogeneous group is working on a separate project in which each group member needs to contribute, there would be an included student. Classroom factors include the flexibility of the teacher in helping the included child connect with the appropriate elements of the regular curriculum. Another factor that is helpful to the inception of inclusion is early commencement. The student who comes to school with peers from the pre-school is already an accepted member of the group.

Reform implementation is about contextualisation and facilitating change. As such, it should be characterized by resource-rich, incentive-driven, continuous support. Concomitantly at the individual school level, there is a need to develop good site-based strategic planning. Planning components include prioritization, task identification, ideas for implementation and community consultation.

Planning needs to be carried out in an atmosphere of school introspection. This is an occasion when a school takes a good hard look at its operation and comes up with a structured plan on how to implement reforms, including insights into problems that might occur. Implementation of policies is more likely to happen when there is closer liaison between those writing policy reform and those who have to implement it. This means there is a strong obligation for policy writers to lie out how reforms will be contextualised and implemented. In Hong Kong, there are examples of policies failing to "catch on" through a lack of contextualisation. The introduction of the less than radical Target Oriented Curriculum (TOC), eight years ago, has required research to find out how to conceptualize and facilitate its implementation, and this has led to it being implemented three times under a different name to gain acceptance, as teachers were so put off by the style of its implementation and apparent lack of local contextualisation.

Integration of disabled children into ordinary schools was a policy recommendation in 1986. Nothing significant occurred until research into how to conceptualize and implement it began eleven years later, in 1997. (Crawford et al, 1999). Policy reform in inclusion needs contextualisation through public education, and the conversion of

categorical special schools, units and personnel to resource centers and people. Legislation and litigation about inclusion, such as that which occurred in America in the seventies, can facilitate reform. Such a "big stick" approach would probably go against the Hong Kong current reform toward school-based management.

However in Hong Kong, there is some "trickle-down" to the education system from recent law changes such as the Disability Discrimination Ordinance (1998). Although this mainly targets employers, there have been recent reports of parents claiming that being refused admission to regular schools has discriminated against their disabled children. Equity has a long journey in Hong Kong. Another incentive to change is a shift in funding. There is rarely more money available, but there is no reason why the cutting of the educational funding pie cannot be altered. Special education groups, especially those with a self-serving interest, may be reluctant to share their resources through re-distribution.

There are other ways of sharing resources. For example, special schools by changing roles and devolving can place and support their students in regular education settings—the context of inclusion. Finally calls for curriculum reform may actually enhance reform in inclusion. The flexibility and tailoring in and of curriculum that is needed by included students may emerge, if the connection between curriculum reform and inclusion is made.

Contextualisation is an important factor for integration, and the growth toward eventual inclusion. Contextualising an issue within the local setting will make it more acceptable. One of the main objectives of education is to make quality of life better for all, and to achieve this the involved parties need to be able to see how it will happen in their context. In the case of inclusion, it has taken a long time for the importance of contextual factors to be taken into account when implementing change. In each of the schools which have begun to take in disabled students, there are, and will continue to be, individual stories of best practices and barriers that arise. (Crawford et al, 1999). Those who implement integration or inclusion must tread a careful path between the introduction of ideas that might be seen as too radical and non-local, and those ideas that are in context, but do little to enhance quality of life for all students, particularly those coming from an inequitable setting.

## **Conclusion**

In Hong Kong, a number of recent steps toward education reform have been taken through efforts to decentralize education, raise standards, and increase accountability and professionalism. It has been argued that, for example, that developing the professionalism of principals must be contextualised prior to and at the implementation stage if a professional development programme is to truly meet their needs and increase the quality of education. Early signs suggest that, encouragingly, this is beginning to take place. Similarly in higher education, unrealistic demands and impractical expectations of the higher education curriculum, teacher educators and student teachers have failed to take into account the context and socialization environment in which education takes place—the schools. In addition there is a de-contextualisation effect created by reforms that contradict one another, e.g., standards- based assessment versus learner-centered teaching. Teachers entering schools for the first time need to be ready for the present, prepared for the future of reform and highly adaptable to change through contextually

authentic teacher education. There is an indication that this is beginning to occur.

Another component of the movement toward quality education through reform has been the development of a Classroom Language Assessment test component for English language teachers. The test is contextualised in the sense that it is an authentic assessment of English teachers in the classroom. It was partly contextualised in that stakeholder groups were consulted about it (the exception being the largest teacher union body in Hong Kong). It was also contextualised in an anticipatory manner by the government who put aside considerable funding, conjecturing that many teachers would want to enroll in language enhancement programmes. However, with regard to the timeframe and evolutionary nature of the policy, there has been less contextuality than might have been desirable, in that insufficient attention was given to test development, or to the amount of time that the total process of establishing the Classroom Language Assessment test would actually take in Hong Kong. Without good contextuality, the implementation of policy is liable to be delayed.

In the case of inclusion, implementation has been slow to materialize because of a lack of contextualisation. The current education reforms in Hong Kong contain a number of elements, such as curriculum adaptation and whole school approach that support the implementation of inclusion. However, contextualisation for successful inclusion needs to operate at all levels and involves complex interactions. There are however, indications of greater emphasis being placed on policy contextualisation at the implementation stage. Implementation of policies is generally more likely to be successful where closer liaison exists between those responsible for developing policy reform and those responsible for implementing it. At all stages there is, therefore a strong obligation for policy writers to consider contextualisation and to state clearly how reforms and policies have been contextualised. In Hong Kong, policies often fail to "catch on" through a lack of contextualisation.

In viewing contextualisation through the four areas of professional development of principals, teacher education, assessment of teacher classroom language assessment and inclusion, it is apparent that reform implementation has little chance of success unless significant contextualisation is undertaken by key players working closely together and make genuine attempts to communicate with each other during all stages of policy formation and implementation. There are indications that in some areas in Hong Kong that this is beginning taking place.

## References

- Au, A. (1998). Language standards and proficiency. In Asker, Barry. (Ed.) *Teaching language and culture: Building Hong Kong on education*, pp. 179-183. Longman: Hong Kong.
- Apple, M.W. (2001). Markets, standards, teaching, and teacher education. *Journal of Teacher Education*, 52(3), 182-195.
- Bickley, G. (1997). *The golden needle: the biography of Frederick Stewart (1836-1889)*. David C. Lam Institute for East West Studies: Hong Kong.
- Bodycott, P. (in press). Blurred visions on a landscape of reform: teacher education in Hong Kong. *Asia Pacific Journal of Education*. Singapore.
- Board of Education. (1996). *Report of the Sub-committee on Special Education*. Hong Kong: Government Printer.

- Chan, S. (1999). The Chinese learner—A question of style. *Education and Training*, 41(6/7), 294-304.
- Cheng, Y.C. (2000). The characteristics of Hong Kong school principals' leadership: the influence of societal culture. *Asia Pacific Journal of Education*, 20(2), 68-86.
- Cheung, M.B. (2000). The changing roles and needs of school principals in Hong Kong. In A. Walker, P. Begley & C. Dimmock (Eds.), *School Leadership in Hong Kong: A Profile for a New Century* (pp. 61-62). Hong Kong: Hong Kong Centre for the Development of Educational Leadership
- Choi, Chee-cheong. (1998). Language standards: an HKEA perspective. In Asker, Barry. (Ed.), *Teaching language and culture: Building Hong Kong on education*, (pp. 184-192). Longman: Hong Kong.
- Cochran-Smith, M. (2001). Editorial: Higher standards for prospective teachers—what's missing from the discourse? *Journal of Teacher Education*, 52(3), 179-181.
- Coniam, D. & Falvey, P. (1999). The English language benchmark initiative: A validation study of the Classroom Language Assessment component. *Asian Pacific Journal of Language in Education*, 2(2), 1-35.
- Coniam, D. and Falvey, P. (1996). *Setting language benchmarks for English language teachers in Hong Kong secondary schools*. Advisory Committee on Teacher Education and Qualifications: Hong Kong.
- Coniam, D. (forthcoming 2002) Illustrating the demands of a performance test through an interactive multimedia syllabus. *International Association for Language Learning Technology Journal*.
- Coniam, D. & Falvey, P. (forthcoming 2001). Awarding passes in the Language Proficiency Assessment of English Language Teachers: Different methods - varying outcomes. *Education Journal*. 29 (2).
- Crawford, N., Heung, V., Yip, E. & Yuen, C. (1999). Integration in Hong Kong: Where are we now and what do we need to do? *Hong Kong Special Education Forum*, 2(2), 1-13
- Disabilities Discrimination Ordinance. (1998). In *Law of Hong Kong*, Chapter 487. Hong Kong: Government Printer.
- Dowson, C. (2001). Paper presentation to Making Integration Successful Programme, HKIEd, February 2001.
- Education Commission (1992). *Education commission report no. 5*. Hong Kong: Government Printer.
- Education Commission. (1996). *Education commission report No. 6*. (ECR 6). Hong Kong: Government Printer.
- Education Commission. (1999). *Education Blueprint for the 21st Century: Review of Academic System: Aims of Education: Consultation Document*. Hong Kong: Government Printer.
- Education Commission (2000). *Learning for life, learning through life: reform proposals for the education system in Hong Kong*. Hong Kong: Government Printer
- Education Department (2002, February). *Continuing professional development for school excellence* (consultation paper on continuing professional development of principals). Hong Kong: Hong Kong Special Administrative Region of the People's Republic of China Education Department.
- Falvey, P. & Coniam, D. (1997). Introducing English language benchmarks for Hong Kong teachers: a preliminary overview. *Curriculum Forum*, 6(2), 16-35.
- Falvey, P. & Coniam, D. (2000). *Language benchmarks for lower secondary teachers of English: Findings and emerging issues*. In *Issues in English Language Benchmarking*. Proceedings of the Colloquium on English language benchmarking, (pp. 9-15). Hong Kong Institute of Education:

Hong Kong Institute of Education.

- Fullan, M. (1993). *Change forces: probing the depths of educational reform*. London: Falmer.
- Gipps, C. (1995). What do we mean by equity in relation to assessment? *Assessment in Education*, 2(3), 271-281.
- Greene, M. (1978). *Landscapes of learning*. New York: N.Y.: Teachers College Press.
- Government of the Hong Kong Special Administrative Region (HKSAR). (2000). *Language benchmark assessment for teachers—English language: syllabus specifications, explanatory notes, specimen questions with suggested answers, scales and descriptors*. Hong Kong: Government Printer.
- Helsby, G. (1999). *Changing teacher's work*. Buckingham, Pa: Open University Press.
- Hong Kong Government (1995). White paper on rehabilitation. Equal opportunities and full participation: A better tomorrow for all. Hong Kong: Government Printer
- Howey, K. R. (1998). *Introduction to the commissioned papers*. Information Series No. 376, (pp. 19-34). Columbus: ERIC Clearinghouse on Adult, Career, and Vocational Education, Center on Education and Training for Employment, the Ohio State University.
- Lin, M.D. (2001, March). *Professional development for principals in Taiwan: the status quo and future needs trends*. Paper presented at the International Conference on School Leaders Preparation, Licensure, Certification, Selection, Evaluation and Professional Development, Taipei, Taiwan.
- Lynch, R. (2000). *New directions for high school career and technical education in the 21st century*. Information series No. 384. Columbus, ERIC Clearinghouse on Adult, Career, and Vocational Education, Center on Education and Training for Employment, the Ohio State University.
- Muta, H. (2000). Deregulation and decentralization of education in Japan. *Journal of Educational Administration*, 38(5), 455-467.
- McTighe, J. (1997). What happens between assessments? *Educational Leadership*, 54(4), 6-12.
- Sanaoui, R. (1999, February 2). *Defining certification standards for ESL instructors in Ontario*. Talk delivered to the Advisory Committee on Teacher Education and Qualifications. Hong Kong.
- Walker, A. (in press). School leadership and management in the Asia Pacific region. In J. Keeves and R. Watanabe (Eds.), *The handbook on educational research in the Asia-Pacific region*. Kluwer Press: Netherlands.
- Walker, A., & Dimmock, C. (in press). Moving school leadership beyond its narrow boundaries: developing a cross-cultural approach. In K. Leithwood & P. Hallinger (Eds.), *Second International Handbook of Educational Leadership and Administration*. Netherlands: Kluwer.
- Walker, A., Begley, P. & Dimmock, C. (2000). *School leadership in Hong Kong: A profile for a new century*. Hong Kong: Hong Kong Centre for the Development of Educational Leadership.

## About the Authors

### Chris Dowson

Senior Lecturer, Department of Educational Psychology, Counseling and Learning Needs

Hong Kong Institute of Education, Hong Kong.

Email: [dowsonc@ied.edu.hk](mailto:dowsonc@ied.edu.hk)

Chris Dowson specializes in inclusion studies and communication. His research interests focus on hearing impairment, second language learning and quality indicators in

education. He teaches courses on classroom practice and effective methods.

**Peter Bodycott**

Principal Lecturer, Department of English  
Hong Kong Institute of Education, Hong Kong

Peter Bodycott has taught in schools and higher education in Australia, Singapore and Hong Kong. His main publications and research interests are in the areas of pre- service teacher thinking, second language learning and teaching, language immersion and the role of narrative in leadership and teacher education.

**Allan Walker**

Professor, Department of Educational Administration and Policy  
The Chinese University of Hong Kong, Hong Kong

Allan Walker specializes in educational leadership and policy. His major research interests center on the influence of culture and context on educational administration and leadership, principal assessment and strategic planning in schools.

**David Coniam**

Professor, Department of Curriculum and Instruction  
The Chinese University of Hong Kong, Hong Kong

David Coniam is a teacher educator, working with ESL teachers in Hong Kong secondary schools. His main publication and research interests are in language testing, computational linguistics and language teaching methodology

---

Copyright 2003 by the *Education Policy Analysis Archives*

The World Wide Web address for the *Education Policy Analysis Archives* is [epaa.asu.edu](http://epaa.asu.edu)

General questions about appropriateness of topics or particular articles may be addressed to the Editor, [Gene V Glass](mailto:Gene V Glass), [glass@asu.edu](mailto:glass@asu.edu) or reach him at College of Education, Arizona State University, Tempe, AZ 85287-2411. The Commentary Editor is Casey D. Cobb: [casey.cobb@unh.edu](mailto:casey.cobb@unh.edu) .

**EPAA Editorial Board**

[Michael W. Apple](#)  
University of Wisconsin

[Greg Camilli](#)  
Rutgers University

[Sherman Dorn](#)  
University of South Florida

[Gustavo E. Fischman](#)  
California State University-Los Angeles

[Thomas F. Green](#)  
Syracuse University

[David C. Berliner](#)  
Arizona State University

[Linda Darling-Hammond](#)  
Stanford University

[Mark E. Fetler](#)  
California Commission on Teacher Credentialing

[Richard Garlikov](#)  
Birmingham, Alabama

[Aimee Howley](#)  
Ohio University

**Craig B. Howley**  
Appalachia Educational Laboratory

**Patricia Fey Jarvis**  
Seattle, Washington

**Benjamin Levin**  
University of Manitoba

**Les McLean**  
University of Toronto

**Michele Moses**  
Arizona State University

**Anthony G. Rud Jr.**  
Purdue University

**Michael Scriven**  
University of Auckland

**Robert E. Stake**  
University of Illinois—UC

**Terrence G. Wiley**  
Arizona State University

**William Hunter**  
University of Ontario Institute of  
Technology

**Daniel Kallós**  
Umeå University

**Thomas Mauhs-Pugh**  
Green Mountain College

**Heinrich Mintrop**  
University of California, Los Angeles

**Gary Orfield**  
Harvard University

**Jay Paredes Scribner**  
University of Missouri

**Lorrie A. Shepard**  
University of Colorado, Boulder

**Kevin Welner**  
University of Colorado, Boulder

**John Willinsky**  
University of British Columbia

## **EPAA Spanish Language Editorial Board**

**Associate Editor for Spanish Language**  
**Roberto Rodríguez Gómez**  
**Universidad Nacional Autónoma de México**

roberto@servidor.unam.mx

**Adrián Acosta (México)**  
Universidad de Guadalajara  
adrianacosta@compuserve.com

**Teresa Bracho (México)**  
Centro de Investigación y Docencia  
Económica-CIDE  
bracho dis1.cide.mx

**Ursula Casanova (U.S.A.)**  
Arizona State University  
casanova@asu.edu

**Erwin Epstein (U.S.A.)**  
Loyola University of Chicago  
Eepstein@luc.edu

**Rollin Kent (México)**  
Departamento de Investigación  
Educativa-DIE/CINVESTAV  
rkent@gemtel.com.mx  
kentr@data.net.mx

**J. Félix Angulo Rasco (Spain)**  
Universidad de Cádiz  
felix.angulo@uca.es

**Alejandro Canales (México)**  
Universidad Nacional Autónoma de  
México  
canalesa@servidor.unam.mx

**José Contreras Domingo**  
Universitat de Barcelona  
Jose.Contreras@doe.d5.ub.es

**Josué González (U.S.A.)**  
Arizona State University  
josue@asu.edu

**María Beatriz Luce (Brazil)**  
Universidade Federal de Rio Grande do  
Sul- UFRGS  
lucemb@orion.ufrgs.br

Javier Mendoza Rojas (México)  
Universidad Nacional Autónoma de México  
javiermr@servidor.unam.mx

Humberto Muñoz García (México)  
Universidad Nacional Autónoma de México  
humberto@servidor.unam.mx

Daniel Schugurensky  
(Argentina-Canadá)  
OISE/UT, Canada  
dschugurensky@oise.utoronto.ca

Jurjo Torres Santomé (Spain)  
Universidad de A Coruña  
jurjo@udc.es

Marcela Mollis (Argentina)  
Universidad de Buenos Aires  
mmollis@filo.uba.ar

Angel Ignacio Pérez Gómez (Spain)  
Universidad de Málaga  
aiperez@uma.es

Simon Schwartzman (Brazil)  
American Institutes for Resesarch–Brazil  
(AIRBrasil)  
simon@sman.com.br

Carlos Alberto Torres (U.S.A.)  
University of California, Los Angeles  
torres@gseisucla.edu

---