Durham E-Theses

The role of publishers in curriculum change: a case study in Hong Kong

Rigby, Sarah

The Role of Publishers in Curriculum Change
A case study in Hong Kong

by
Sarah Rigby

ABSTRACT

This study sought to explore the role of publishers in curriculum change by asking teachers about the perceptions and beliefs they held about a new task-orientated English curriculum introduced into secondary schools in September 2001.

The subjects of the study were 78 Form 1 and/or Form 2 Secondary English teachers from 14 schools. These teachers were asked to fill in a questionnaire. Later 11 teachers from 11 of these schools were interviewed .

The study shows that although most teachers report that they feel quite confident about the aims of the new syllabus, there is some doubt as to the depth of their understanding. The study also pinpoints some areas of concern for teachers: in particular the teaching of grammar and the suitability of the new syllabus for weaker students.

The study confirms previous findings of a high reliance on textbooks in classrooms in Hong Kong. Further, it shows that teachers felt that their textbook had helped them to implement the new syllabus. Perhaps the most important finding of the study is the discovery that groups using different textbooks perceived the syllabus in different ways. This has important implications for the way in which textbooks are produced, in particular suggesting that a closer relationship between the Education and Manpower Bureau (the government body responsible for implementing new syllabi in Hong Kong) and the publishers could help to bring about more effective curriculum reform.

The Role of Publishers in Curriculum Change
A case study in Hong Kong

by

Sarah Rigby

1 2 MAR 2004

CONTENTS

LIST OF FIGURES AND TABLES

LIST OF ABBREVIATIONS

CD	compact disc
CDI	Curriculum Development Institute
CDC	Curriculum Development Council
CMI	Chinese medium of instruction
CT	cassette tape
EC	Education Commission
ED	Education Department
ELT	English language teaching
EMB	Education and Manpower Bureau
EMI	English medium of instruction
ESP	English for special purposes
KMO	Kaiser-Meyer-Olkin
NET	native English-speaking teacher
OUP	Oxford University Press
P-P-P	presentation-production-practice
SARS	severe acute respiratory syndrome
T1	*English Treasure*
T2	*Longman Target English*
TOC	Target Orientated Curriculum

DECLARATION

SCHOOL OF EDUCATION
UNIVERSITY OF DURHAM

Degree of Doctor of Education

I hereby certify that all material in this submission which is not my own work has been identified as such and that no material is included which has been submitted to any other institution for any other award or qualification.

ACKNOWLEDGEMENTS

CHAPTER 1   INTRODUCTION

In September 2001, it became mandatory for Secondary 1[1] teachers in secondary schools in Hong Kong to teach English according to a new Target Orientated Curriculum (TOC). The curriculum, although 'new' to secondary schools, was not totally unfamiliar. Over 60% of primary schools[2] adopted TOC in Maths, Chinese and English in September 1996 (with this figure rising to 90% in 1997 for English) and a TOC English syllabus for Secondary 6 and 7 was put into operation in 1997[3]. In line with the aspirations of the Education and Manpower Bureau (EMB) (then called the Education Department (ED)) that there 'should be one single English Language curriculum for all levels of school education from Primary 1 to Sixth Form with an outlook towards continuing education after schooling' (Curriculum Development Council 1999, p. 2), this development therefore represented what could be seen as the putting together of the last piece of the jigsaw.

Although the introduction of the TOC English syllabus to primary schools had been tumultuous and subject to a highly critical public reaction (Morris 2000), it appeared that there was little if any resistance to the introduction of the secondary syllabus. Indeed, just a year before its introduction to schools (a year after the syllabus was published in 1999) a survey of 303 secondary English teachers carried out by a lecturer at Hong Kong Polytechnic University (Tsang, personal communication) showed that only about half of them were aware that there would be a new syllabus.

1.1   Aims and significance of the study

This study was completed during the second year of teachers' exposure to the new secondary English syllabus and aimed to explore the role of publishers in curriculum change by asking two groups of teachers (each using a different textbook) about the perceptions and beliefs they held about the new TOC secondary English syllabus, the textbook they were using to teach the new syllabus, and publishers.

The null hypothesis underlying the study is that choice of textbook does not affect teachers' perceptions and beliefs. That is, that textbooks and publishers do not have a role in bringing about curriculum change. This could be argued to be true if the two groups of teachers do not differ in terms of their perceptions and beliefs.

In order to test this null hypothesis, a questionnaire was administered to two groups of teachers followed up by interviews. The only perceivable difference between the two groups of teachers was the textbook that they used – either *English Treasure* (which will also be referred to as T1) or *Longman Target English* (referred to as T2). These two textbooks were produced by two rival textbook publishers in Hong Kong – Oxford University Press (OUP) and Pearson Education (which publishes books for the local school market under the Longman imprint). A short introduction to these two textbooks and to the two publishers is given later in this chapter.

The design and methodology of the investigation is described in Chapter 4 and the data is analysed and presented in Chapters 5 and 6. Immediately before these chapters, the literature surrounding the background to this particular curriculum change and the nature of the reform is reviewed in Chapter 2 – looking in particular detail at the earlier introduction of a similar curriculum to primary schools in Hong Kong.

Since this study is as much about textbooks as it is about curriculum reform, Chapter 3 reviews the literature surrounding textbooks – their use, their advantages, their disadvantages and in particular their role in representing the curriculum and their role as agents of change. Although, as pointed out by Zahorik (1991), there are a number of studies which have focused on textbooks' content, i.e. general content, cognitive processing, clarity, level of interest and readability, it is found that there are few studies on how teachers use textbooks and even fewer which determine whether textbooks can influence curriculum reform. Given the indisputable importance of textbooks in the learning process, indeed Westbury (1990, p. 1) goes as far as to state that 'textbooks are an enduring and influential part of schooling [and] that they define much of what

12

teachers teach and students learn', this would appear to be a distinct gap in knowledge – a gap that this study aims to partially fill.

Chapter 7 discusses the results of the study, looks at the implications of the findings, and explores the limitations of the study. The chapter ends with a conclusion which lists the principal findings and suggests recommendations for further research. Among other areas, one key area of interest that this chapter touches upon is the relationship between the EMB and the publishers of textbooks, a relationship that has been described by Tong, Adamson and Che (2000, p. 149) as being 'not close', but one that is clearly central (at least for the time being) to the provision of high-quality teaching and learning material that supports changes in syllabi.

1.2   Background to the study

Throughout this study, continual reference will be made to the textbook review process and the various organisations involved in this process, the different textbook publishers in Hong Kong, and textbook use in Hong Kong. Some background knowledge about these three areas is essential for an understanding of the wider issues under discussion.

1.2.1   Textbook review

In Hong Kong, schools are not allowed to place a textbook on their book list (of books for students to buy) unless the book has first been approved by the appropriate reviewing panel of the Textbook Committee. The Textbook Committee forms part of the Curriculum Development Institute (CDI), which is the part of the EMB responsible for developing curricula and helping schools to implement curriculum policies and innovations.

The Textbook Committee comprises textbook reviewing panels for each subject. The panels are made up of teachers, lecturers from the colleges of education and tertiary institutes, and subject specialists from the CDI. For textbooks to gain approval, it is essential that they are judged to have covered the current syllabus provided by the Curriculum Development Council (CDC). The coverage must be 100%.

Although the CDI provides the secretariat for the CDC, the CDC is described as a free-standing body and is appointed by the Chief Executive to advise the government (through the Director of Education and Manpower) on curriculum development. It also prepares curricula, which once recommended by the EMB, must be followed in schools. Progress is monitored by the Advisory Inspectorate (a division of the EMB) and the CDI.

The CDC aspires to be 'widely representative of the local educational community' (CDC 1999) with 'membership including heads of schools and practising teachers from government and non-government schools, lecturers from tertiary institutes, officers of the Hong Kong Examinations Authority and well as those of the CDI, the Advisory Inspectorate and other divisions of the Education Department' [ibid]. It is also claimed that 'the membership of the Council includes parents and employers' [ibid]. Despite this aspiration to be 'widely representative', the CDC is still perceived by many to be a part of the EMB and anecdotal evidence points to some confusion amongst teachers between the CDC and the CDI with regard to their roles and responsibilities. The extent to which the CDC is truly representative is also doubtful especially when one looks at the membership of some of the subject committees[4].

In addition to ensuring the books cover the CDC syllabus, the Textbook Committee judge whether submitted textbooks meet other criteria too. These include criteria for quality in four areas: content, learning and teaching, language and technical design. A full list of the Guiding Principals for Quality Textbooks are available on the CDC's web site (address provided in the Bibliography).

The review process takes between three and four months after which time the publisher is provided with a Textbook Review Report (also called the 'yellow forms'). The yellow forms grade the book under review as either an 'A' grade (which means the book will be included on the recommended textbook list) or as a 'B' grade (which means it is not included). The financial repercussions for publishers who fail to receive an 'A' grade are huge. This is particularly true at times of syllabus change as failing to get recommended

means 'missing the boat' often for as long as three years[5]. The yellow forms are, not surprisingly, awaited by publishers with great trepidation.

In addition to conveying the all-important 'grade', the yellow forms also include a list of 'Required amendments' and 'Suggestions for improvement'. The required amendments must be made to the books. If they are not, the Textbook Committee has the power to remove the textbook from the recommended book list. The suggestions for improvement are made at the authors' and publisher's discretion. Publishers and other third parties are requested to keep the contents of the yellow forms confidential and there is a statement on the forms which warns that under no circumstances should the comments be used for any form of advertising, sales promotion or publicity. The comments therefore cannot be made available to teachers or other interested parties.

Since recommended textbooks must cover the current CDC syllabus, the implementation of a new secondary English syllabus meant that the nine textbooks previously available to schools had to be replaced by new ones. Not surprisingly, this entailed a huge publishing enterprise. (The textbooks used in this study – *English Treasure* and *Longman Target English* – were two of the new textbooks).

1.2.2   Textbook publishers in Hong Kong

Since parents buy all textbooks for their children, Hong Kong (as commented in a recent article about an industry report for the British Council and Publishers Association) is 'a good market for its size' (Francis 2002, p. 25). The same article estimates that there are 'more than one million students' and 'the average annual spend is HK$1,500 (£140) per student', an amount that Francis comments 'would make the UK schoolbook publishers green with envy'.

Such a 'good market' has obviously attracted attention from a number of publishers (both overseas and local companies) although as Francis comments (p. 25), 'UK publishers have historically been strong'. The two strongest UK publishers are Pearson

Education (which from this point onwards will be referred to by this writer as Longman) and OUP.

Both Longman and OUP publish widely for the school market, publishing books (in both English and Chinese as required) for all major subjects at kindergarden, primary and secondary level. According to Francis (p. 25), 'Pearson Education is the market leader at primary level and dominates the English market segment in particular. Oxford University Press is the market leader at secondary level'.

Prior to the new syllabus, four publishers published recommended textbooks: Longman, OUP, Macmillan and a local publisher by the name of Aristo. All publishers published more than one course: typically a course for average to above average students and a course for average to below average students. Although local publishers such as Aristo have managed to compete (and in fact in the mid-nineties were market leaders for several years), the investment involved in producing whole courses of textbooks plus the range of supporting material is exorbitant and deters many from entering the market. The trend to incorporate more IT materials into the teaching aids has raised the entry level of investment even further.

Five companies produced textbooks for the new syllabus, or rather produced *approved* textbooks for the new syllabus. It is possible that more companies submitted books but were unable to secure approval from the Textbook Committee. This would not be unheard of. When the TOC syllabus was implemented in primary schools, several publishers submitted books but were ultimately not approved (only two publishers were approved for primary – Longman and OUP).

The five publishers who produced approved textbooks were Longman, OUP, Macmillan, Aristo and a newcomer Ling Kee (a publisher previously better known for its secondary Geography textbooks). These publishers prepared courses on the basis of standard guidelines, the CDC syllabus and a few briefings[6] with members of the CDI. The first four publishers published two courses each. Ling Kee produced one, which was later

withdrawn when it became apparent that adoption figures (i.e. the number of schools using the book) would be very low and the book would not be commercially viable.

1.2.3   Textbook use in Hong Kong

Textbooks, as in many other parts of the world, are widely used in Hong Kong. In 2000 (before the implementation of the new syllabus), 402 out of 420 secondary schools (96%) in Hong Kong listed an English Language textbook on their book lists. In 2002, this figure rose slightly to 98%. In addition to the undisputed fact that a huge number of textbooks are sold every year, there is also ample evidence to suggest that textbooks are an integral part of an average Hong Kong English lesson. A survey of English teachers in 249 schools by Richards, Tung and Ng (1992) showed that only 28% of teachers reported that they made significant use of exercises and materials which they had prepared themselves, although disappointingly, the exact definition of 'significant' is not clarified in the study. Richards (1993, p. 1) also concluded that 'for many teachers the commercial textbook is the primary source of teaching ideas and materials in their teaching'. Despite (or perhaps *because of*) such high usage amongst teachers, the use of textbooks is rather 'frowned upon' by the ED, who prefer to encourage 'the use of school-based learning/teaching materials to meet the learning needs of students' (Education Department 2000).

1.3   Definition of terms

Throughout this study, it will be necessary to refer frequently to 'textbooks' and the materials that accompany them. It will also be necessary to use terms such as 'curriculum' and 'syllabus'. It is therefore necessary to establish clearly how these terms will be used within this thesis.

1.3.1   Textbooks and the materials that accompany them

The word 'textbook' is defined in various ways in the literature. Johnson (1993, pp. 24-26) lists definitions ranging from 'books made and published for educational purposes' to the even broader 'all materials used in teaching'. Sheldon (1997, p. 1), referring to ELT material, defines a textbook as a 'published book, most often produced for

commercial gain, whose explicit aim is to assist foreign learners of English in improving their linguistic knowledge and/or communicative ability'.

Adamson and Lee (1994, p. 295), understanding that increasingly ELT materials comprise a variety of interlinked components, prefer to use the term 'textbook resources' instead of 'textbook' to refer to 'not only the textbook that forms the core of the materials, but also to the complementary resources such as workbooks, audio cassettes and video tapes'.

For the purpose of this study, the term 'textbook' will be used to describe the book that is submitted to the ED for approval, what is often called the Student Book. The term 'textbook resources' will be adopted to describe any publication or supplementary material that carries the name of the textbook. Typically, this list includes Workbooks, Listening books, Grammar books (for some courses), Audio cassettes and CDs, Teacher's Books, Teacher's Resource Files and IT materials. The term 'course' will be used when it necessary to draw a distinction between one set of textbook resources and another.

1.3.2   Curriculum and syllabus

It is almost undoubtedly unwise to attempt to define the terms 'curriculum' and 'syllabus' in a couple of paragraphs when entire books are written on the subject. As pointed out by Glatthorn (1987), different definitions (particularly of the term 'curriculum') abound, with different definitions varying hugely in their breadth. Some researchers construe the term 'curriculum' broadly as all the experiences a learner has in school (Tyler 1957). Some define the term more narrowly as a plan or set of outcomes (Sayler, Alexander and Lewis 1981).

It is actually more desirable that this section should seek to provide, for the purposes of clarity within this study, little more than a functional distinction between the two terms and clarify that the two terms should not be used interchangeably.

A distinction between the terms 'curriculum' and 'syllabus' favoured by this writer is provided by Marsh and Stafford (1988, p. 3).

> First, 'curriculum' subsumes the term 'syllabus'. A syllabus, such as one listed in
> an external examination manual, is typically a listing of content which will be
> examined, although sometimes it is garnished with a small number of general aims
> and objectives and preferences for particular types of student activities. By contrast
> a curriculum is all of this and more. A curriculum will include a listing of content,
> but there will also be a detailed analysis of other elements such as aims and
> objectives, learning experiences and evaluation, and explicit recommendations for
> interrelating them for optimal effect.

The syllabi which will be referred to in this thesis are therefore the 'lists of content' drawn up by the CDC for the subject of English. These syllabi do not define the whole curriculum (in this case, the Target Orientated Curriculum), although as Venezky (1992) contends they can play an important part in defining the 'desired curriculum'. Venezky's five-level categorisation of the curriculum (into the needed curriculum, the desired curriculum, the prescribed curriculum, the delivered curriculum and the received curriculum) will be looked at in more detail in Chapter 3 when the issue of how textbooks can help to define the curriculum is discussed.

1.4 An introduction to *English Treasure* and *Longman Target English*

As mentioned previously, this study is based upon two sets of users: teachers using OUP's *English Treasure* and teachers using Longman's *Longman Target English*. It is clearly necessary to provide the reader with some basic understanding of the nature of these two courses although, for reasons that will be explained in the final section of this chapter, a full-scale critical review of the two textbooks under study will be avoided.

1.4.1   The nature of the two courses

As mentioned on the previous page, it is usual for publishers in Hong Kong to produce two courses: a course for average to above average students and a course for average to

below average students. Both *English Treasure* and *Longman Target English* fall into the category of 'courses for average to below average students'.

1.4.2   The launch of the two courses

The two courses were launched in spring 2001 (*English Treasure* in February and *Longman Target English* in March). As is customary for the launch of new courses in Hong Kong, the two courses were launched at seminars held in big, international hotels in a central part of Hong Kong (Tsim Sha Tsui). At the seminars, the respective publishers promised to explain the new TOC syllabus to teachers and to explain the features of their new courses (including IT materials and other supporting teaching materials).

Following the launch of the courses, visits to teachers were not only made by sales representatives but school-based workshops were also held by publishers to promote the new courses. These school-based workshops were usually conducted by more specialist presenters than the sales representatives themselves, for example specialist English language teaching (ELT) executives or members of the ELT editorial teams. The workshops were usually held to explain the nature of the new TOC syllabus and to demonstrate some of the more unusual supplementary teaching resource material (often the IT material). The use of school-based workshops as a promotional tool had not previously been seen for secondary textbooks and as such represented a new feature, probably prompted by the greater uncertainties teachers had about the new TOC syllabus.

1.4.3   Similarities and differences between the two courses

There were a number of similarities between the two courses. One noticeable similarity was that neither publisher strayed from their usual practice of presenting the teaching and learning material in the form of books. In earlier meetings with the ED, the publishers had been encouraged to produce more flexible packages of materials, perhaps comprising files of resource materials. However, no publishers took this opportunity.

20

Likely reasons are that it was felt that such a package might be unacceptable to teachers due to its less structured nature and the fact that junior form students would be unable to manage (that is, not lose) bits of the file.

In terms of the number of components, both courses included six Student Books (1A-3B) of about 100 pages accompanied by listening cassette tapes (CTs) or compact discs (CDs). The Student Books were divided into modules, which were then divided into units (as suggested by the syllabus). The books covered many similar topics known to be popular with teachers and students, e.g. School, Japan, Technology, Superstitions. Both courses also included interleaved Teacher's Books and a range of supplementary titles: six Listening Books (plus listening CTs/CDs), six Workbooks, six Grammar Books (which were all accompanied by Teacher's Editions).

Longman Target English included one supplementary title not included in *English Treasure*: a Project Book. Although the completion of projects is an important part of the new TOC syllabus, OUP probably deemed a separate book unnecessary because, unlike *New Target English*, *English Treasure* contained projects within the Student Books.

One manifestation of the competitive nature of the textbook market in Hong Kong is the extent to which textbook publishers are prepared to provide free materials to teachers who use their books. *English Treasure* and *Longman Target English* provided free Teacher's Books, free Teacher's Editions and free supplementary teaching resource material, which comprised IT teaching and learning material and Teacher's Resource Files. The free supplementary teaching resource material provided by the two courses, although similar in terms of 'volume', was different in terms of 'detail', although 'staples' such as extra grammar and vocabulary worksheets were present in both sets.

1.5   A discussion of probable ethical issues

As stated by Zeni (2001, p. ix), 'The last decade or so has seen a remarkable resurgence of interest in insider investigations of teaching, learning and schooling'. She [ibid] goes

on to state that 'many have seen the power of these "indigenous" inquiries to question and transform business as usual in schools and universities'.

This study clearly falls into the category of an insider investigation as the researcher works within the editorial team responsible for producing one of the textbooks under study – *Longman Target English*. Although as an 'insider' within a publishing company, this writer is in a position to give some rarely offered insights into the workings of publishers and the publication process, it must also be acknowledged that such an insider has ethical responsibilities that are fundamentally different from those of an outsider doing research into the same area. These ethical responsibilities are considerable and as noted by Mertens (1998, p. 23) should be 'an integral part of the research planning and implementation process, not viewed as an afterthought or a burden'.

In order to make ethical issues 'an integral part of the research planning and implementation process', one needs to start the research process with a clear list of areas where ethical issues are likely to affect the study. In an attempt to provide a list of ethical checkpoints for insider researchers to follow, Zeni (2001, p. xvii) uses the work of Kirsch (1999) to provide the following definitions.

> *Location:* What a researcher brings to the inquiry – gender, race, class, roles, status in the institution. How do these aspects of culture connect or divide a researcher from colleagues, students, other participants?
>
> *Relationship:* The human dynamics, friendships, and professional responsibilities that may be threatened or enhanced by the research. To whom is the researcher accountable?
>
> *Interpretation/Definition:* How the researcher represents the subjective experience of others to consider multiple perspectives. How do various participants define the issues?
>
> *Publication:* Texts, forms, and voices that bring the research to a wider public. How does the researcher tell a complex story truthfully and respectfully to varied audiences?
>
> *Institutionalisation:* Legal and procedural expectations in the university, school or other setting. What guidelines apply when research involves more than one institutional culture?

The first four checkpoints would appear to have special significance for this study. The final one, 'Institutionalisation', is less applicable because of the lack of conflicting legal and procedural expectations. By looking at each of the first four checkpoints in turn, the ethical issues can be explored.

Of course, this researcher brings all the factors listed under 'Location' to the inquiry. However, of those listed, 'race' and 'role' can be highlighted as two important ones. For example, looking at 'race' as an issue, in dealing with teachers (who are largely Hong Kong Chinese with Cantonese as their first language), is it possible that the teachers' responses are affected by the fact that the researcher is a Western, native speaker of English? Turning to 'role', since the researcher is known to teachers from seminars as 'a Longman person', might this affect their response? Might the Longman users be particularly positive and responsive and the OUP users less so? These two intertwining issues will be reflected upon further in Chapter 4.

At this point, it is worth pointing out that the issue of 'role' is one reason for declining (in the section above) to offer a more critical review of the textbooks. Even if it were possible for this researcher to compare the two in a non-biased way, it would be impossible to defend that it was a non-biased appraisal. This job is definitely best left to 'outsiders'. Within this study, it is preferred that any comparison be made based on teachers' comments, although even this method (as discussed below) is fraught with difficulties.

The 'Relationship' factor is also an important one. The nature of the research has the potential to produce multiple conflicts of interest due to the essentially confidential nature of some of the material. Some clear examples include the contents of the 'yellow forms' given out by the ED (which the ED asks be kept confidential) and market-sensitive material that the researcher's employer would prefer to keep confidential (e.g. the market share of different books, the profitability of different books, and the researcher's insider knowledge that may give away a publisher's competitive edge).

These are all clearly minefields that need to be stepped around in the pursuit of open research.

The 'Interpretation/Definition' factor has clear implications for qualitative work such as interviews where the potential for bias in questioning and reporting is huge. However, as pointed out by Jones (2000, p. 152), it is also just as important for quantitative research where 'the nature of the study sample, the sample size, the type of statistical design, the form of quantification employed' are also open to bias. These issues as they relate directly to the design and methodology of the study and the data analysis will be discussed in Chapters 4, 5 and 6.

The issue of 'Publication' has clear relevance to the writing of this thesis and the ability of the researcher to 'tell a complex story truthfully and respectfully to varied audiences' is surely one of the criteria by which this thesis will eventually be judged.

In conclusion, the ethical issues raised by an insider study of this kind are clearly considerable and deserve to be revisited (as they will be) throughout the thesis. However, it is believed that the insights that the researcher brings to the study as an insider can balance out these 'deficiencies', thereby adding to the very important debate about curriculum change, teaching and textbooks.

CHAPTER 2   LITERATURE REVIEW: CURRICULUM REFORM

The aim of this chapter is to review the literature surrounding curriculum reform, in particular focusing on the TOC curriculum reform that forms the basis of this study. The review starts by looking briefly at the changes in the secondary English syllabi prior to the introduction of the TOC syllabus. It then looks in more detail at the introduction of TOC to primary schools and the 'genesis' of the TOC policy. This is followed by a look at the introduction of the TOC initiative to secondary schools and a summary of the features of this new syllabus. Finally, these threads are drawn together by discussing these findings in the context of the broader existing literature surrounding curriculum reform.

2.1   Changes in the secondary English syllabi prior to TOC

Why should students learn English? In countries around the world, the answers vary depending on whether English is taught as a content subject or as a second/foreign language but most importantly on the socio-political-economic conditions in each country at different times (Walker 2000).

Why should students learn English in Hong Kong? In the early 1970s, the answer was to pass exams, move on to university and secure a good job in either government or commerce (Sweeting 1993). At that time, most children left school after primary school and worked in secondary industries. Education (particularly English education) was purely for an elite. The English syllabus at this time reflected these conditions and was essentially 'in the form of an examination blueprint, outlining the generic contents of examination papers' (Walker 2000, p. 234).

By the mid-70s, there were already moves to implement nine-year compulsory education. This move to extend education to the masses was largely spurred by an improvement in economic conditions which led to the emergence of a middle class who put pressure on the government to provide more secondary school places for their children. Morris (1995, p. 125) points out what could also have been two other important

factors: the government did not want to be seen by the West as using child labour, and in the riots of the late 1960s children had been involved. Involving children in more schooling was one way of keeping them out of the factories and off the streets.

A new syllabus, which was published in 1975 in reaction to the move to nine-year compulsory education, was a more clearly defined attempt to state the teaching and learning objectives and was no longer defined solely by an examination syllabus. Labelled 'oral-structural' by its writers (Curriculum Development Council 1975), the syllabus' stated objectives were that pupils completing the first three years of secondary education should be capable of 'simple self-expression in speech and writing', 'comprehension of straightforward, everyday English both spoken and written', and 'be capable of reading for information and enjoyment' (Curriculum Development Council 1975, p. 6).

By the early 1980s, the socio-political-economic conditions in Hong Kong had changed considerably. Secondary industry was in decline as factories moved across the border to make use of cheaper sources of labour in mainland China and tertiary industry was rapidly becoming more and more important as Hong Kong, with its rule of law and stable banking system, was able to provide business and financial services for those trading with mainland China. It became clear that 'simple self-expression' and 'everyday English' were not sufficient to cater for the needs of the workplace and the 1983 English Syllabus was the result. This time labelled as having a more 'communicative' element (Curriculum Development Council 1983, p. 5), the syllabus stated that one of the main aims of the teacher was to provide students with an 'opportunity to put English to use in the classroom' (Curriculum Development Council 1983, p. 6). Predicted domains of use were even spelt out: the domain of work, the domain of outside world communication, the domain of government and officialdom, the domain of pleasure and entertainment, the domain of communication with non-Cantonese speakers in Hong Kong, and the domain of study.

It was against this background of syllabi changes (there had been two new syllabi for primary English within the same period – the 1976 Syllabus and the 1981 Syllabus), that the idea of a new TOC syllabus was mooted (first in primary and then in secondary).

2.2   The introduction of TOC to primary schools

As explained in Chapter 1, the new secondary English TOC syllabus was implemented in secondary schools as part of a 'through-train policy' that enabled students who had been taught in primary schools with the new syllabus to continue to learn with the new syllabus in secondary schools. In order to understand more about the syllabus and the problems (or perhaps lack of problems) encountered during its implementation in secondary schools, it is therefore helpful to understand how TOC was introduced into primary schools. In an attempt to explain the 'career' of the TOC reform from its inception to the form in which it was finally accepted into primary schools, Morris (2000) defines three distinct phases: phase 1 (from 1990 - 1993), phase 2 (from 1993 - 1997) and phase 3 (1997 – now[7]).

2.2.1   The first phase of TOC

According to Morris (2000), the first phase started in 1990 following Education Commission Report Number 4 (1990). At that time, the curriculum was called Targets and Target Related Assessment (TTRA) and it was planned that it would be introduced into Primary Four (the beginning of Key stage 2) from 1995. As pointed out by Morris (2000, p. 23), 'the overall emphasis in this first phase was on assessment, selection and the promotion of accountability'.

A key part of TTRA was a system of criterion-referenced assessment, which it was intended would replace the existing system of assessing students in Primary Six (the Academic Aptitude Test)[8]. The system of assessment at that time was an extremely 'high-stakes' exam given that the outcome was used to stream students into secondary schools (Stimpson and Morris 1998) and it was probably not entirely surprising that it was the assessment aspect of the reform that drew most 'hostile fire' from not only members of the educational and political communities but also parents and the media. It

27

was also widely perceived as the actions of a retreating colonial government which wanted to impose a 'Western curriculum' on Hong Kong before it left. Many people also suspected that it was, as Morris put it (2000, p. 23), 'an attempt to introduce by the back door a means of language-based assessment'. This caused further hostility.

2.2.2 The second phase of TOC

In response to criticisms of TTRA, an advisory body was set up in 1993. This advisory body renamed the curriculum as TOC, suggested implementing the syllabus from Primary One (hence avoiding criticism from parents already in the primary school system) and delinked the curriculum from language assessment. The focus moved away from assessment to pedagogy and, at the same time, the government not only showed greater flexibility but also promised to commit more resources in order to implement the change. During this phase, which lasted from 1993 to 1997, the discourse became markedly less hostile and more and more schools adopted and adapted TOC (Morris 2000).

2.2.3 The third phase of TOC

Morris (2000, p. 23) describes the third phase as an 'ongoing phase'. He describes the phase as one that 'is characterised by a combination of uncertainty and vacillation'. Morris (2000, p. 25) also notes that 'the current perception [in 2000] is that TOC no longer forms a central part of the government's educational reform agenda'. Citing evidence for this, he gives a number of indicators that he believes have contributed to this perception. For example, in 1998, a policy of 'delabelling' was initiated, which meant that schools were no longer labelled or funded according to whether they had adopted TOC or not.

However, one could argue that, at this point, the vast majority of schools were already 'TOC schools' and therefore labelling was unnecessary. A similarity can be found in the textbooks available for primary schools. In the early years, textbooks were labelled as TOC textbooks or by omission as not TOC textbooks. As these textbooks were published in their third editions, this label was dropped. It was unnecessary as the

28

requirement of the ED means that the fact that they are approved is indication enough that they are TOC textbooks. It could be that the same was true of schools. The TOC label had become cumbersome and unnecessary.

According to Morris, another indicator was that in early 1999 the Legislative Council (LEGCO) passed a unanimous motion that the implementation of TOC in upper primary schools be delayed. However, although this made clear that the policy would not be extended to other subjects, the commitment to TOC for the teaching of English remained strong. In the context of curriculum reform it is probably necessary to draw attention to the fact that at this time (early 1999) the Education Commission (EC) was conducting an overall review of the education system which eventually culminated in the curriculum framework 'Learning to Learn'. This initiative was first publicised by a series of presentations to teachers in November 2000 (Curriculum Development Council 2000a). This can probably partly explain why the government's stance softened further and why, as Morris points out, 'refererence to the reform [the TOC reform] in the public speeches of senior members of the educational policy-making community has either [in 2000] been avoided or been critical of it'. It is therefore uncertain, at least in the mind of this writer, whether the curriculum reform was truly marginalised or whether it just became incorporated into the 'Learning to Learn' initiative.

2.3   The genesis of the TOC policy

Many writers have commented that policy making is rarely a linear, logical process and it has variously been described as emerging from a 'primeval soup' (Kingdon 1984), a 'garbage can' (March and Olsen 1984) and as a result of 'decision creep' (Weiss 1980).

Although Kingdon (1984) portrays policy as emerging from a 'primeval soup', he also identifies three important streams which he suggests converge to produce policy. These three 'streams' are problems, expertise and the political context. To these three streams Morris (2000) has also suggested that within the Hong Kong context, it is necessary to add the influence of a 'fourth stream' – the availability of external precedents. Of course, Hong Kong is not unusual in seeking external precedents; however, due to its

29

small size and perhaps also one could postulate its colonial past, it is not difficult to understand why this factor is of such dominant influence in Hong Kong. It would therefore appear to be a useful addition to Kingdon's interpretive framework. This writer also finds it useful to expand 'political context' to 'political and social context' for reasons that will be explained later.

2.3.1 Problems

Hong Kong in many respects has only recently been able to supply universal education to its population. Universal primary and then junior secondary schooling were only introduced in 1971 and 1979 respectively, and up until this point were the major sources of public concern and education policy. In the 1980s there was a shift towards more concern over qualitative and curriculum-orientated issues and a number of these were identified in an internal ED report (Education Department 1989) and then later 'publicised' in Education Commission Report Number 4 (1990).

The 'problems' identified in the reports included a dissatisfaction with:

- the perceived declining language standards (in both English and Chinese);
- a lack of clear learning objectives;
- excessively teacher-centred teaching styles;
- the competitive nature of the school system; and
- a general feeling that overall curriculum reform may be necessary in order to keep in step with the rapid change in economic conditions (from a predominantly manufacturing-based economy to an almost exclusively service-based economy).

To what extent these were actually 'problems' is of course extremely debatable. For example, to a certain extent 'declining language standards' was some sort of inevitability as universal junior secondary schooling widened the net to include a greater range of students and moved away from the previously extremely elite model of education. Also, whether the reports identified the most important problems is also debatable. When asked about the problems they face in the classroom, many classroom practitioners often state that their greatest concern is poor working conditions – a fact reinforced by the

30

study conducted by Tsang in 2000 (personal communication). Common complaints include large class sizes[9], noisy classrooms (to the extent that nearly all teachers teach with a microphone), hot classrooms, and a heavy teaching load. Strangely enough, these 'problems', although apparently widely known, appear to be 'accepted problems' and have never been identified as 'problems to be solved'.

2.3.2   External precedents

As mentioned before (pp. 22-30), it is common for policy makers in Hong Kong when faced with a problem (or problems) to react by looking overseas for precedents. In describing the TOC initiative, Adamson and Morris noted that 'curricular reforms in recent decades have been characterised by a shift away from school-based initiatives towards state-mandated attempts to promote forms of outcomes-based education' (2000, p. 7). Dimmock and Walker (1997), referring to the implementation of the National Curriculum in the UK and new curriculum frameworks in Australia, also made the same point, commenting that this particular reform was entirely in line with major curriculum developments elsewhere.

In many ways, the new TOC syllabus was Hong Kong's own version of an 'outcomes-based curriculum' and, like the curriculum initiatives found in the UK and Australia, included 'a new battery of central controls that established a strong regulatory framework' (Flude and Hammer 1990, p. vii).

One could argue that looking to external precedents was a 'habit' picked up during Hong Kong's colonial past. Indeed much of the present structure of the schooling system is based on the UK school system. However, to do so might be an oversimplification. Hong Kong is a small place and therefore has a smaller pool of people to draw upon for ideas and advice. Hong Kong, it could also be argued, is also 'the land of the quick fix' and that for 'the city that never sleeps' importing a model for transplantation allows rapid change – something that Hong Kong prides itself upon.

31

Of course, it cannot be forgotten either that external precedents can also be an extremely effective way of legitimising change. For example, in 1996, when TOC was receiving criticism from many quarters, Tsui See Ming (then Senior Assistant Director at the ED) was quick to argue that TOC reflected an international trend in education and stated that 'what we in Hong Kong have labelled TOC more or less follows what other countries are doing' (Forestier 1996).

Whatever the reason, the external precedents of curriculum reform in the UK, Australia and New Zealand (Clark, Scarino and Brownell 1994) were extremely influential in this reform. The implications will be further discussed below.

2.3.3   Expertise

Morris (2000) identifies that, in the TOC initiative, many of the key players in terms of expertise were supplied by the ED, the Education and Manpower Branch and a group of English language experts from the Institute of Language in Education. The style of leadership, as identified by Morris, was 'strong'. Many of the ideas surrounding task-based learning and criterion-referenced testing were supplied by the 'experts' at the Institute of Language in Education. Notably, a number of these experts had been involved in such initiatives in the UK, Australia and the USA.

The reliance on foreign experts in this case, led to the oft-quoted criticism (Forestier 1996) that TOC was 'promoting a style of teaching and learning that has its roots in the West'. Many of those who resisted the change did so on the grounds that they felt that this was an inappropriate model for Hong Kong. Of course, it cannot be forgotten that at this pre-handover time Hong Kong's sense of 'nationalism' was running high and therefore there was a heightened sensitivity to issues such as these.

The strong influence of the 'foreign experts' was also problematic for other reasons. As reported by Forestier [ibid], there was 'much criticism that TOC was initially developed by expatriates, with the needs of English teaching in mind'. This led to much resistance from specialists in Maths and Chinese (the two other subjects that TOC was planned to

be implemented in). For example, in 1996, Leung Koon Shing (then Dean of the Faculty of Education at the University of Hong Kong) was reported as saying the following: 'The framework started off as a framework for English language. But we don't think it can be applied to Mathematics or Chinese' (Forestier 1996).

As for the 'foreign experts' themselves, the same newspaper article quoted above reported John Clark (the project leader at the Institute of Language in Education) as saying 'those of us who developed TOC initially didn't involve teachers and academics enough, though it would have been extremely difficult to do so'. This was refuted by fellow 'foreign expert' Verner Bickley (who had also been a member of the development team at the Institute of Language in Education) as being untrue six days later (Bickley 1996) but nonetheless showed that someone who had been a very public face of the TOC reform was prepared to show that mistakes may have been made. It also suggests that perhaps the leadership was in many ways too strong and too forceful (and could have benefited from being more consultative). An explanation for this particular brand of strong leadership can be found by studying the political and social context.

2.3.4   Political and social context

As noted by Morris (2000, p. 28), 'the colonial government was keen in its last decade to demonstrate strong leadership'. He further notes (p. 28) that the 'reform of education was one of the few domains of policy in which its room for manoeuvre was less subject to external constraints'. The cynical have also noted that since the government's tenure was due to end on 1 July 1997, there was little interest in the long-term consequences of policy decisions. This writer would contest this view on the grounds that many of the policy makers were in fact local civil servants who knew they would not depart post-1997 and indeed whose children would experience the Hong Kong education system for themselves.

Of course, as referred to before, the imminent return of Hong Kong to China did lead to a heightened sense of 'nationalism', which was reflected in decreased tolerance for foreign experts and precedents, particularly in the subjects of Maths and Chinese. This

effectively put an end to the initial dream of cross-curricular reform and served to dilute and weaken the initiative at an early stage.

Other changes of a more social nature were also afoot at this time. The 'Tiananmen experience' led many Hong Kong people to feel extremely wary of their incoming leaders. At the same time, many people also felt a mistrust of their outgoing leaders on the grounds that, since they were leaving, their motives could not be trusted. It could therefore be argued that this environment led to an increasing feeling amongst people that if you wanted something changed you had to 'do it yourself'. This, this writer would postulate, was one factor that led to an increasingly important 'parent voice' and as a result an increasing amount of interest from the media. 'Parent power' was not only important because parents increasingly felt that it was their right, it was also significant because the parents themselves (thanks to Hong Kong's rapidly broadened education system) were themselves better educated, more involved in their children's education and more articulate.

Parents in the early stages supported the introduction of TOC. An article in the South China Morning Post in 1995 (South China Morning Post 1995) reported that from a poll of 5,486 primary school parents, 81% believed that TOC should be introduced into Hong Kong schools. Interestingly, 88.7% believed that TOC would let them better understand the progress of their children, thus helping them to coach their children. This figure indicates the strong involvement that parents felt in their children's schoolwork; however, it is also a pointer to why the reform later became unpopular with some parents. Most coaching is tied to exam success – be it success in kindergarten interviews, success in primary school interviews or, at this time, success in the all-important Academic Aptitude Test. At the point at which it became clear that this initiative would affect the secondary school selection process many parents rebelled and became quite hostile to the reform.

2.4 The introduction of TOC to secondary schools

Having looked at the background of confusion and contradiction that accompanied the introduction of TOC into primary schools, it is interesting to explore the atmosphere in which the English Language TOC syllabus for secondary schools was introduced. Certainly, anecdotal evidence from secondary school teachers in 2000 suggested that many teachers thought the curriculum had been dropped and would not be implemented in 2001. The survey carried out by Tsang which, as mentioned before, found that in 2000 only about half of the teachers surveyed (n = 303) were aware of the new secondary English syllabus would appear to support this. It is difficult to understand, however, why this feeling was so prevalent when in 1999 the CDC had already published their Syllabus for Secondary Schools: English Language Secondary 1-5. Also, at that time, the CDC had already started to organise seminars in order to promote and explain the principles of TOC.

Although there is no published information at this time that documents the implementation of the secondary English TOC syllabus, anecdotal evidence points to a certain 'reform fatigue' in secondary English teachers at this time. In 1999, teachers were invited to seminars promoting the new secondary English syllabus. A year later, they were invited back again to seminars promoting in effect another curriculum framework – Learning to Learn (Curriculum Development Council 2000a, Curriculum Development Council 2000b). Although the document for the 'Key Learning Area (KLA) of English Language' makes a point of saying that 'the curriculum framework is closely related to the CDC Syllabus for English Language (Primary 1-6) 1997, CDC Syllabus for English Language (Secondary 1-5) 1999, and CDC Syllabus for Use of English (Sixth Form) 1999 in setting the main direction for the teaching and learning of English', many found the fact that it also stated that 'in addition, it makes suggestions for *further* [my emphasis] language curriculum development which aims at bringing about effective language learning' extremely confusing.

Amongst this background of curriculum reform, there was also a push by the government (first announced in Chief Executive Tung Chee Hwa's inaugural policy

address) to increase the use of IT in education (Education and Manpower Bureau 1998). Published just three years before the introduction of the new secondary English syllabus, it suggested that 25% of the school curriculum be taught with the support of IT by the year 2002/03. Many teachers found this reform quite 'threatening' and English teachers in particular felt professionally unprepared to use IT so extensively in their lessons. The 'top-down' nature of the reform and the ensuing pressure from principals and then panel chairs[10] appeared to further alienate teachers and contribute to the 'reform fatigue'.

As mentioned previously, it cannot be ignored that the separate issue of benchmarking[11] was also an influential factor affecting teacher morale at this time. At one CDC-run workshop to promote the Learning to Learn initiative, a teacher stood up, supposedly to ask a question, but then, much against the chairperson's wish, proceeded to ask (in an extremely roundabout fashion) why when teacher's professionalism was being called into question by the benchmark test were they at the same time being asked to exercise quite considerable professionalism in juggling and implementing all these new reforms. That a teacher was bold enough to politicise the meeting in this way was unusual in itself. However, what was more unusual was the almost unanimous support given to this 'disobedient' individual by the over 500 teachers gathered in the lecture theatre. This 'evidence', although anecdotal, can give us clues about the mindset of teachers at this time. Many, it could be postulated, were simply beyond caring and, with regards to the new syllabus, were simply resigned to 'accept their fate'. It is hoped that more evidence will emerge from researchers studying this aspect of the curriculum reform as time goes by.

Although teachers seemed relatively 'unphased' by the new syllabus, why weren't parents and the media as concerned about this new syllabus as they had been about the primary syllabus? Again there is little available evidence. However, the answer may simply be that since this syllabus was designed as a through-train syllabus from primary to secondary, parents (despite opposition at some stages) had by now already accepted TOC in primary and therefore were not unduly worried. Also, since the Hong Kong Examinations Authority had already made it clear that the HKCEE would not change as

36

a result of the new syllabus, there was no anxiety related to its effect on the public examinations.

2.5 Features of the new TOC secondary English syllabus

Having established the socio-political context in which the TOC reform was introduced, it is now important to focus on the pedagogic context, in particular to attempt to clarify the features of the new TOC secondary English syllabus compared with the old.

TOC was premised on the need for the learning content of the syllabus to be better defined. It is therefore not surprising that the new TOC secondary English syllabus sets out a clear list of learning targets. As stated by Adamson and Yu (1997, p. 15), these targets 'are designed to give a framework for measuring children's progress in learning'. The new syllabus groups the learning targets into three 'dimensions': the Knowledge Dimension (KD), the Interpersonal Dimension (ID), and the Experience Dimension (ED). Adamson and Yu explain the three dimensions as follows (p. 15).

> The Knowledge Dimension is mainly cognitive. It is concerned with the children's intellectual development. The Interpersonal Dimension is about how to relate with others and how to communicate effectively. The Experience Dimension is about expressing and sharing feelings, ideas and other personal aspects.

The syllabus suggests that the learning targets can best be achieved through the completion of 'tasks'. As Tong, Adamson and Che note (2000, p. 148), 'the conception of tasks varies widely, and no real consensus exists among language educators'. Some educators such as Breen (1987, p. 23) suggest that a task is 'any structured language endeavour which has a particular objective, appropriate content, a specified working procedure and a range of outcomes for those who undertake the task'. This rather wide definition encompasses 'brief exercise types' but also 'more complex and lengthy activities'. Nunan (1989), Rivers (1991) and Stern (1992) defined tasks in a narrower way and believe that tasks should have an authentic context.

The TOC definition also focuses on authentic context but also places great emphasis on authentic communication. In addition, it specifies that a task should: have a purpose; have a context; 'involve learners in a mode of thinking and doing'; have a product; and should 'require the learners to draw upon their framework of knowledge and skills' (Curriculum Development Council 1999, p. 43).

One of the basic rationales of the new syllabus is that one can learn by doing, i.e. that one can learn by completing tasks. Not only are tasks seen as the best way to achieve the learning targets but they are also seen as the best way to realise the five principles of learning promoted by TOC – the attractively labelled 'Five fundamental intertwining ways of learning and using knowledge'. These five principles are inquiring, communicating, conceptualising, reasoning and problem solving.

The syllabus realises the need for a broader range of materials than that necessary for the completion of tasks. As stated by Adamson and Yu (1997), 'in order to carry out tasks, the children will need to be equipped with the necessary skills and language'. Exercises are therefore described in the syllabus as being 'good preparation for the completion of tasks' (Curriculum Development Council 1999, p. 44). 'Exercises' do not need to contain the five features of a 'task' and therefore can focus on practising individual language items or skills. They can be drills but it is recommended that 'they are best carried out in the context of a task' (Curriculum Development Council 1999, p. 44).

Another feature of the syllabus that is probably worthy of mention is the overall organisational structure: the use of modules, units and tasks. The module is described as the organising focus and it is suggested in the syllabus that each module contains a number of units which are 'thematically or conceptually linked' (Curriculum Development Council 1999, p. 44). The themes or concepts in the units are then explored through the use of tasks. The relationship among modules, units and tasks is best represented graphically. Such a figure can be found on the following page.

```
                        ┌──────────┐
                        │  Module  │
                        └────┬─────┘
          ┌──────────────────┼──────────────────┐
     ┌────┴────┐        ┌────┴────┐        ┌────┴────┐
     │  Unit   │        │  Unit   │        │  Unit   │
     └────┬────┘        └────┬────┘        └────┬────┘
      ┌───┴───┐      ┌───────┼───────┐      ┌───┴───┐
  ┌───┴──┐ ┌──┴───┐ ┌──┴──┐ ┌─┴──┐ ┌──┴─┐ ┌──┴──┐ ┌──┴──┐
  │ Task │ │ Task │ │Task │ │Task│ │Task│ │Task │ │Task │
  └──────┘ └──────┘ └─────┘ └────┘ └────┘ └─────┘ └─────┘
```
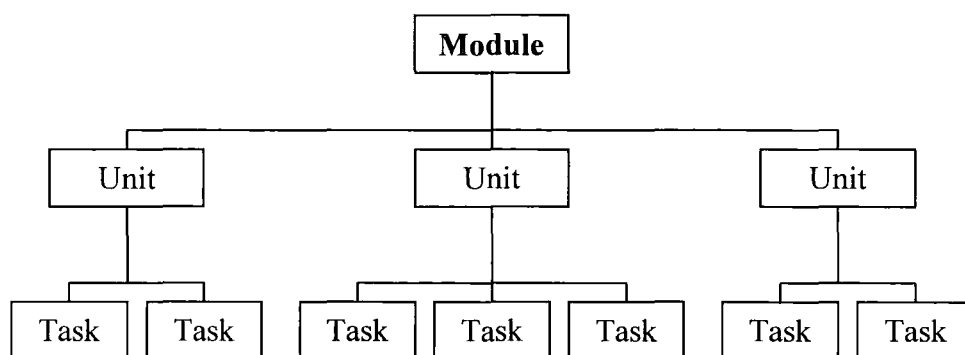
Figure 1 The relationship among modules, units and tasks (Curriculum Development Council 1999, p. 43)

In a paper that attempted to exam the extents to which methodology and content have changed in secondary school English language syllabi from 1975 to 1999, Walker, Tong and Mok-Cheung (2000, p. 259) concluded that 'it was found that there has been a shift from classical humanist[12], transmissive, grammar-translation methodology to reconstructionist[13], oral-structural, pre-communicative methodology to progressivist[14], task-based, communicative methodology.

Walker, Tong and Mok-Cheung point out seven major methodological changes from 1975 to 1999 (2000, p. 267).

1 demise of an explicit translation approach in the 1983 syllabus

2 introduction of test-teach-test approach to listening in 1983

3 introduction of holistic, task-based approach though language arts in 1983

4 a more genre-based approach to writing introduced in 1983, where the reader of the text was important

5 a more "communicative" approach within defined domains of speech and writing introduced in 1983

6 progressivist methodologies become more and more prominent and

7 a task-based approach introduced in 1999 for implementation in 2001 [sic]

Walker, Tong and Mok-Cheung (2000) raise an important point about content too. As they explain (p. 259), 'Syllabus content is generally what most interests teachers of subjects such as Mathematics, Sciences, or Social Sciences. For language teachers,

however, the language system, or grammar, has always been the "given" content'. They therefore go on to explain that whatever the methodology the first thing that teachers want to know about any new syllabus is (p. 260) 'the answer to the question "how do I teach the grammar?"'.

Although lack of content in the new TOC secondary English syllabus was not a 'new' feature it was the source of some criticism. As reported by Walker, Tong and Mok-Cheung (2000, p. 286), it was felt that there was 'no attempt to link the medium (English) with the message of other subjects in the school curriculum' hence encouraging the attitude commonly expressed by students that 'English is a subject, not a language'.

Other criticisms about the new syllabus voiced by teachers concerned the language system itself. Whereas the previous (1983) syllabus had provided precise guidelines about the form and function of the language items to be taught, to many teachers the new syllabus was scarily vague on this issue. The suggestion that one introduced language items as and when one needed them to enable students to complete tasks was completely at odds not only with their training but also with their own experience of learning.

Although it is not believed that this represents a mainstream criticism from teachers, it is perhaps also worth repeating the criticism recently leveled at recent English syllabi by the Chairman of one of Hong Kong's political parties – the Democratic Alliance for the Betterment of Hong Kong. In an article in the South China Morning Post (Tsang 2003), Tsang Yok-sing laments the abolition of translation which he argues 'served to highlight the syntactic differences between English and Chinese, and helped students develop alertness to pitfalls related with "mother-tongue interference" in learning the foreign language' [sic].

Although it is not essential for the purposes of this study to equip the reader with a complete understanding of the secondary English syllabus, it is hoped that one can convey not only the place of this syllabus in terms of methodology and 'history' but also

the complexity of the syllabus document itself. Anecdotal evidence suggests that many teachers felt overwhelmed by the syllabus and confused by the terminology when they first saw the syllabus. The publishers had a further challenge. They had to develop a set of materials that would satisfy the multiple criteria laid out in the syllabus. The word 'set' is important here because the syllabus gave very little guidance about this aspect, giving more guidance about the preparation of individual 'exemplar' tasks. The problems experienced by publishers will be explored in further detail in Chapter 3, when the publishers' perspectives of developing material for the primary English TOC syllabus are explored.

2.6 The nature of curriculum change in Hong Kong

Having looked at recent syllabus changes and in particular the introduction of the target orientated curriculum change, it is interesting to reflect on the general nature of curriculum change in Hong Kong. The conclusion must be that it is a strange mix of a 'laissez faire' approach combined with bureaucratism (particularly with respect to change processes). Walker, Tong and Mok-Cheung (2000, p. 261) summarise this nicely when they state that 'the curriculum still manifests characteristics of direct state control, despite government attempts to distance itself from involvement'.

This, what could be described as 'schizophrenic approach' to educational policy and in particular curriculum change, has led some writers (Adamson and Morris 2000, p. 10) to comment that 'curriculum reform in Hong Kong since the Second World War has been characterised by a pattern that can best be described as an amalgam of *ad hoc* adjustments, institutional incrementalism and crisis management'. Sweeting (1993, 1997), through extensive historical analyses of education policy, explains this pattern as the dilemmas of a colonial government which, in order to ensure its survival, interfered in society, commerce and the curriculum whenever it felt its tenuous legitimacy challenged. As was shown earlier in this chapter, sometimes the challenge came from parents, sometimes from employers, and sometimes from external observers.

Five years into the new administration, it is interesting to reflect upon whether things have changed since the handover. There are certainly some areas which, in the past, were left to schools' discretion and market forces (e.g. language of instruction and bench-marking) but which now are strictly prescribed. This would appear to signal the development of an even stronger top-down stance. It may also be tempting to conclude that the new government's style of managing policy is more consistent than the old, yet this can be questioned.

In the time since the secondary English syllabus was first published, an inconsistency has clearly emerged between the aims of the TOC syllabus and the discourse of the Education Department. The TOC syllabus is undoubtedly outcomes based. For example, in the TOC English Language Syllabus for Secondary Schools, in a section that attempts to explain the principles behind the curriculum design, the following explanation is given (Curriculum Development Council 1999, p. 3).

> To ensure that learners spend their time and effort meaningfully and for maximum benefit, there must be a plan for them to work according to specific learning targets which are geared towards the aims of the curriculum. All learning and assessment activities, including the contents and strategies for such activities, should be geared towards maximum learning effectiveness for achieving the learning targets.

The syllabus is over 270 pages long and much of it is given over to listing learning targets and objectives. In addition, certain features of the new syllabus, for example tasks, are described in extremely prescriptive terms.

In contrast to these attempts to introduce a unified approach to the teaching of English, it is therefore strange that since 2000 the Education Department has been keen to indicate that it 'encourages the use of schools-based learning/teaching materials to meet the learning needs of students' and adds that 'teachers are encouraged to use their professional judgement in preparing/choosing such materials' (Education Department 2000). This approach would seem to be more inline with the schools-based approach favoured in the eighties and before.

Although not entirely relevant to the discussion, it is also probably worth drawing attention to the fact that teachers and members of the teaching unions have also spotted a further inconsistency in the EMBs discourse. They point out that at the same time as teachers are being encouraged to use their professional judgement, their professional judgement is being called into question by the government though its insistence on the bench-marking of language teachers.

2.7   The dissemination of innovation and change

The English TOC curriculum has now been taught in most primary schools for nearly seven years. At the time of writing, it has been taught in secondary schools for two. It is interesting to ask to what extent this curricular innovation has been a 'success' in schools. It is also interesting to consider what were the attributes of the innovation that either led to its success or lack of success.

Markee (1997, p. 40) puts forward his own list of innovation attributes that he suggests may potentially promote (+) or inhibit (-) curriculum innovation. These are:

- relative advantages (+)
- compatibility (+)
- complexity (+)
- observability (+)
- trialability (+)
- form (concrete: +, abstract: −)
- explicitness (+)
- originality (+ / −)
- adaptability (+)
- feasibility (+)

Up to a point, this list is useful. However, it totally fails to take into account the absolutely central position of front-line educators − the teachers and school

administrators. Kelly (1994), in a study of the implementation of another top-down reform – the National Curriculum in the UK, points to what this researcher considers to be three more central attributes. These are:

- there should not be a wide gap between the idea of the curriculum held by its central planners and that of the teachers attempting to implement it in their classrooms – the aims and objectives need to be absolutely apparent to teachers

- teachers should not be treated as a largely passive recipient of change and innovation should not be planned on their behalf – teachers need to be involved at all stages of the planning

- teachers need to be, or to become, committed to any planned change if it is to work

A combination of these two sets of attributes can be used as a framework with which to look at the findings that have so far been published about the implementation of TOC. So far, the published literature relates solely to primary schools and there is a paucity of data about secondary schools (a situation that this study will partially redress). However, given the many similarities between the primary and secondary schools, it is believed that these findings can provide useful pointers to how successfully the innovation will 'transplant' to the secondary system.

The most frequently cited cause of tension in implementing the new syllabus in primary schools is encapsulated by Morris (2000, p. 9) when he notes, 'TOC contained a number of features that were in fundamental conflict with many of the structural features of the system of schooling and the school curriculum. These were not the object of policy decisions and remained in place – thus ensuring ongoing tension between the reform and the context in which it was implemented'. That is, to use Markee's classification, the innovation was not 'compatible' with the school system and therefore was effectively not 'feasible'.

In a study by Wong and Pang (2000) which looked for differences between the intended curriculum and the implemented curriculum, several mismatches were found. These are summarised in the table on page 45.

Intended curriculum	Implemented curriculum
• teachers as independent curriculum developers • task-based teaching • catering for individual learner differences • student-centred learning • TOC assessment	• teachers are directed curriculum implementers • task-book teaching • homogeneous teaching • teacher-directed learning • school-devised testing

Table 1 Major mismatches between the intended and implemented curriculum (Wong and Pang 2000, p. 305)

All of these five 'mismatches' can be partially explained by the intended curriculum's incompatibility with the school system. When the innovation was implemented, teachers were given no 'free time' in their timetable to move from being 'curriculum implementers' to 'curriculum developers' nor to develop materials that could replace textbooks. At the time of the implementation, neither class sizes were reduced nor more teaching staff employed to allow teachers the luxury to move from 'teacher-directed learning' and 'homogenous teaching' to 'student-directed learning' and a system of 'catering for learner differences'. Finally, as discussed in some detail earlier in this chapter, little was done to change the system by which students were assessed (with most assessment remaining high-stakes, summative assessment rather than formative assessment). The frustration of one teacher is evident in one quote given by Wong and Pang (2000, p. 302).

It's time consuming to design graded tasks for different ability groups because there are hardly any such resources available and it is difficult to do it in a big class of 37. Besides, we have to teach them the same things because they have to sit the same examination after all.

45

Similar observations have been made by other researchers. Lo (2000, p. 58) provides another example of how the constraints of the school culture essentially stifled a move to a more student-centred form of teaching. Talking about a case study in a primary school, she made the following observation.

> Some teachers who had attempted to use a more pupil-centred pedagogy actually had very little tolerance for noise made by the pupils, so that there were many disruptions in the course of the activity because the teacher had to stop to call for quiet.

Since, in many schools, 'noisy classes' are often seen as a sign of a teacher having lost control and are frowned upon (Tong, Adamson and Che 2000), less whole class work and more group and pair work clearly poses quite a problem.

Tong, Adamson and Che (2000) also make an interesting point about the English TOC syllabus when they compare the focus of the old and the new syllabi. They point out that although both syllabi stressed the communicative functions of languages, learning targets in the new syllabus are organised in dimensions – interpersonal, knowledge and experience – whereas the old syllabus focused on the four skills – reading, writing, listening and speaking. This is at odds with the way most primary classes are organised, where it is usual (and expected by the school administrators and parents) to have 'a listening lesson', 'an oral lesson', 'a grammar lesson', etc.

In their study, Wong and Pang (2000) also found evidence that many teachers simply did not understand the nature of the innovation. That is, that there was a 'wide gap' between the idea of the curriculum held by its central planners and that of the teachers attempting to implement it. They found (p. 300) that although 'most teachers claimed that or thought that they were doing tasks in their English lesson', most teachers were in fact 'doing exercises and activities … without a clear and thorough understanding of what task-based learning is'.

Although many of the teachers in Wong and Pang's study had attended an in-service course and/or other forms of training organised by the ED and had read some of the TOC documents (including the syllabus), when asked why they thought they were doing tasks, they reasoned that they must be because (p. 300) 'they were teaching TOC classes in their schools and they were using task-books in teaching English'. The training had clearly in most cases failed to explain to them the thinking behind the proposed change and the theoretical considerations underlying it. It would be interesting to determine the timing of this training, the length of the training, the extent of the training and perhaps even who did the training.

That those who had read some of the TOC documents had failed to pick up much is more understandable. As mentioned before, the syllabus was not only extremely long it was also full of jargon (most of which was tightly defined in a very syllabus-specific fashion – the definition of a task being one such example). To use Markee's (1997) language again, the 'form' (as defined by the syllabus) was 'abstract' and although in some sense 'explicit', much of the explicitness focused on things that essentially did not matter to teachers (e.g. long and complex definitions of terms that were not central to their teaching needs).

As warned by Kelly (1994, p. 105), when teachers are seen as largely a passive recipient of change, they 'have often been seen to "cannibalise" what they have been offered, to modify it and adapt it to the particular context of their own teaching and to the norms of their own group'. An example of this kind of behaviour plus an endorsement of the point made above about lack of knowledge about the reform is provided by Morris et al (1996, p. 243) in a study that reviewed the classroom practice of TOC.

> Overall, the indications at this level of the study suggest that while many teachers had begun to use some of the vocabulary associated with TOC, their understanding of many of its key elements was limited, so that they had significant difficulties in operationizing the key concepts in the classroom. In general, the pattern emerging was one of the teachers trying to assimilate TOC to their usual practices, rather than changing the practices to accommodate TOC.

As pointed out by Kelly (1994, p. 105), 'Teacher-proof curricula were shown long ago to be unworkable' yet here we seem to have another example of the implementation of one.

Another area worthy of exploration is whether teachers were committed to the change or saw the need for the change. As noted by Tong, Adamson and Che (2000, p. 152), 'the previous syllabus promoted the presentation-production-practice (P-P-P) approach, which was based on a linear syllabus of linguistic items'. Again, as noted by Tong, Adamson and Che (p. 152), 'task based learning [is] organised around holistic communicative acts (based on the pupils' need, interests and ability) that serve as the vehicle for pupils to learn'. Such a change in pedagogy requires that teachers be motivated to make it work and there is much evidence (Marris 1986, Blackler and Shimmin 1984, White 1988) that teachers only tend to be motivated if they have been involved in what is happening, feel to some extent in control of the change, and are aware of the need for change. There is much evidence (Carless 1998, Cheng 1994, Morris 2000) that this was not so in the case of this reform. Teachers did not feel that they had 'ownership' in the innovation. A quote from Wong and Pang (2000, p. 298) captures the 'reform fatigue' (referred to before in this chapter) of many teachers well.

> The curriculum changes too quickly. The teachers in my school, and even our
> principal do not know enough to keep up with the pace and we are not well
> prepared to change yet.

A final problem identified by researchers in primary schools (and one that has been 'kept back' because it provides a nice bridge to the next chapter) is the problem of finding teaching materials to support the change in curriculum. Lo (2000, p. 57) noted that some of the teachers in the school she studied were 'worried about the lack of resources'. She notes that 'they relied heavily on textbooks, yet they were not happy with the quality of those available, believing that the textbooks for all three subjects (English, Chinese and Maths) were not really written for TOC'. It will be interesting to

see to what extent this will pose a problem for secondary teachers and of course points to an area that is central to this study.

2.8   Conclusions

The results of this literature review show that although much has been written about the introduction and 'genesis' of the TOC policy with respect to primary schools, perhaps due to the relatively recent introduction of the curriculum reform to secondary schools very little is documented about the policy's introduction to secondary schools, although certain 'difficulties' can perhaps be anticipated (e.g. the deeply entrenched organisation of lessons around the teaching of skills, the strong 'wash-back effect' of public examinations particularly in more senior forms (Tang and Biggs 1996), and the lack of opportunity to cater for individual differences due to the large class sizes). Another potential 'difficulty' (and one that will be explored in the next chapter along with other issues related to the use of textbooks and their role in defining the curriculum and in bringing about change) is the provision of teaching materials to support the new curriculum and the publishers' role in this process.

CHAPTER 3   LITERATURE REVIEW: TEXTBOOKS

As mentioned in Chapter 1, despite the widely held opinion that textbooks constitute the most widely used resource for teaching and learning in schools (Westaway and Rawlings 1998, Elliott and Woodward 1990, Westbury 1990, Altbach and Kelly 1988), their study has been much neglected and has tended to have had a rather negative focus. Stray (1994, p.1), in fact, goes as far as to say that 'textbooks have rarely been taken seriously as an object of study' while Graves (1997, p. 32) observed that research output was 'pitifully small'. Of course, this is not equally true all over the world. For example Marsden (2001, p. 2) points out that 'Research into textbooks has long been a more respected locus of interest in the United States than in Britain'. An indication of the apathy among researchers in the UK is provided by Marsden (2001, p. 57), who presents a survey of the contents of 10 leading British educational journals[15] over a period of 10 years (from the late 1980s to the late 1990s). In the survey, Marsden found only three papers about textbooks. Further evidence to support the relative lack of interest in the UK is provided by Hopkin (1998, p. 19) who arrived at the conclusion that interest in textbooks in the UK was relatively meagre after comparing indexes of educational journals in Britain and other countries.

Although it is impossible to know, it is interesting to speculate why there is a difference in interest between the UK and, in particular, the US. One possibility is that in the US (unlike the UK but like Hong Kong), students are expected to buy their textbooks themselves rather than rely on school sets. Therefore not only is the textbook business more valuable and more competitive in the US per capita than in the UK, there is also not surprisingly heightened interest from the consumer, i.e. students and parents. The point is made because of the similarity between the textbook markets of the US and Hong Kong[16].

3.1   The criticism of textbooks

It is interesting to note that while criticism of textbooks has always been evident, it has, as commented by Marsden (2001, p.1), 'in recent decades in Britain become more

strident, both formally, in the educational literature, and informally as a "puzzling and continuing feature of many conferences and conversations" (Wright 1996, p. 13)'. Marsden identifies three types of critical reactions to textbooks (2001, p. 2).

> The first bemoans their presence and campaigns for prohibition. The second accepts their necessity, but demands measures for affecting reform. In general, a majority of American writers have taken the second stance. In Britain the first has been more evident. The third and most extreme variant is to ignore the textbook as a subject worthy of serious study, as has also happened in this country [Britain].

If it is in fact true that 'The received wisdom remains that textbooks undermine professionalism, typify an undesirable transmission model of teaching and learning, and are generally incompatible with progressive educational practice' (Marsden 2001, p. 1), it is clear that there is a 'thought chasm' between the views of academic educators and practising teachers.

An important example of this point comes from a study by Ball and Feiman-Nemser (1988, p. 401), who found that the student teachers enrolled on two different teacher education programmes all 'developed the impression that if they wanted to be good teachers, they should avoid following textbooks and relying on teacher's guides' and furthermore developed the idea that 'good teaching means creating your own lessons and materials instead'. However, when these students took up teaching jobs, they all ended up using textbooks to teach with. The reasons for doing this given by the teachers were maintaining established classroom practice but also being overwhelmed by the sheer volume of work that needed to be done.

This phenomenon is one reason why Hargreaves (1996) has suggested that teachers are able to be effective in their practice in almost total ignorance of the research infrastructures of the educational theorist. This rather negative treatment of textbooks could also be one factor in explaining why research in education 'does not seem to have been well received by the teaching community' (Lidstone 1988, p. 282). These comments have added significance for this study given that the implementation of the

51

TOC syllabus was largely an intervention by educational theorists and, as mentioned in Chapter 2, was largely perceived as being 'fine in theory' but impossible to implement in the class.

3.2   Use of textbooks

Despite the obvious critical eye with which many educators view textbooks, a number of studies have shown that textbooks are widely used in schools around the world. An investigation by Zahorik (1991) found that 82% of teachers used a textbook in teaching. Further evidence comes from Shannon (1982), who found that textbooks were used for 70 to 95% of the time that students spent in classrooms, and Woodward and Elliott (1990) who found that 89% of classroom time involved the use of commercial instructional materials.

There is also evidence to show that textbooks are also widely used to teach English as a foreign or second language. Johnson (1993) describes two Scandinavian studies. In the first study, he found that the use of published material accounted for 96% of teaching time. In the second study, he found that 71% of teaching time was spent on teaching from textbooks.

As pointed out in Chapter 1, a high reliance on textbooks is found in Hong Kong too. In addition to the report by Richards, Tung and Ng (1992) mentioned in Chapter 1, Li (1994, p. 11) has also reported that 'textbooks play a very important role in the teaching of English in Hong Kong Secondary schools'. In a study by Law (1995, p. 67), it was found that 66.4% of the 101 Secondary English teachers in the survey 'used English textbooks almost every lesson'. Law also found that 84.1% of them 'used textbooks and [published] supplementary materials more often than materials designed by themselves'. Further evidence comes from Sampson (2001, p. 61), who found that 80.2% of the 86 Secondary English teachers surveyed agreed that 'textbooks were very important in language teaching'. A high percentage (88.4%) also 'believed textbooks to be the most convenient resource in their teaching'. As pointed out in Chapter 1, it is the norm for secondary schools to list an English Language textbook on their book lists. It is also

usual for accompanying Workbooks, Listening books and maybe other supplementary titles, e.g. Grammar books, to be listed too.

3.2.1   The role of experience in teachers' use of textbooks

As reported by Marsden (2001, p. 208), it is a long-standing contention that 'textbooks are essential props for less than expert teachers, and that the more inexperienced the teacher the more the prop is necessary'. This point of view is supported by a number of studies cited in Woodward and Elliot (1990, p. 231) who report that 'teachers with substantive knowledge and self-confidence relied less on textbooks in their teaching'. Cunningsworth (1995) also concludes that teachers' experience and confidence will affect their degree of dependence or autonomy in using textbooks.

A study carried out in Hong Kong by Law (1995) showed that Hong Kong is no different from anywhere else in this respect. Law (p. 71) found that 'less experienced teachers agreed that using textbooks gave them confidence and security to a greater extent than more experienced teachers'. Experience in this study distinguished between teachers with less than 5 years' experience and teachers with more than 5 years' experience. However, an important point to raise within the Hong Kong context is the generally poor qualifications of teachers (Education and Manpower Bureau 2002) although in recent years this situation has improved enormously[17]. Lack of a degree in the subject being taught and lack of a teaching qualification could both be explored as other 'sources' of inexperience.

Interestingly, a study carried out in Hong Kong (Sampson 2001) showed that native-speaking English teachers relied less on textbooks than non-native-speaking teachers. Sampson (p. 62) found that 45.5% of native-speaking teachers used textbooks more than self-designed materials compared with 72% of non-native-speaking teachers. In addition, the vast majority of non-native-speaking teachers (81.8%) said they often used self-designed material compared with only 62.6% of non-native-speaking teachers. This could be explained in terms of experience since most native-speaking English teachers are employed under the Native-speaking English Teacher Scheme[18], which only employs

53

extremely experienced and well qualified (some would say over-qualified) teachers. It could also be explained in terms of 'culture' though. This will be explored briefly in the next section.

3.2.2   The role of 'culture' in teachers' use of textbooks

The Chinese neo-Confucian tradition stresses the importance of 'the book' as the central learning resource. A number of researchers (Adamson and Lee 1994, Lee 1996) have pointed out that it is this tradition that can partially explain teachers' high reliance on published educational material. Interestingly, they also note the influence not only on teachers, but also on parents and students.

Of course, there is also the factor of what could be described as 'normal practice'. Local teachers, having themselves been educated in Hong Kong, are accustomed to a schooling system that uses a lot of books and therefore to a certain extent consider this to be the norm. Teachers with experience of other 'schooling cultures' may be less accustomed to using published material and therefore less likely to want to use it.

3.3   Reasons for the dominance of textbooks

Having established that textbooks are widely used, one must ask the question 'Why?' and in doing so clarify the role that textbooks can play in the classroom. Of course, since there is often a 'flip side' to many of the advantages of textbooks, this is also an opportunity to explore further the potential negative impact of textbooks.

3.3.1   Practical considerations

Richards (1993, p. 3) points out that 'the most obvious reasons for the widespread use of commercial textbooks are practical ones' and goes on to identify four main practical factors. One important factor relates to teacher training. He states (p. 3) that 'if teachers were not allowed to use textbooks, they would need additional training in the preparation of materials'. He also goes on to add (p. 3) that 'teachers would have to have reduced teaching loads in order to take on these additional responsibilities'. Clearly these are two very important factors for Hong Kong teachers, who still tend to be

'under-trained' and 'over-worked'. These two factors are also very much based on the assumption that the skills necessary to be a materials writer are a sub-set of the skills necessary to be a teacher. That is, all teachers could write materials if only they had a bit of training and a bit more time. This is questionable at a number of levels. Firstly, teaching and writing are two quite different disciplines. Secondly, writing materials for the teaching of English requires an extremely high standard of English – one that many native speakers cannot actually attain let alone non-native speakers.

Of course, training and time are only two practical considerations why teachers often choose to use textbooks. Another important factor is, as Richard (1993, p. 3) puts it, the fact that 'school-produced materials can rarely compare qualitatively with commercial materials, which often reflect huge budgets for development and production'. O'Neill (1982, p. 107), recounting his experience of teaching in a German shipyard, makes the simple observation that problems with accessing photocopying facilities and the sheer cost of photocopying combine to make books 'good value for money simply in terms of paper alone'.

The fourth factor that Richards points out is flexibility, which is actually an umbrella term for a variety of related factors. He states that (p. 3) 'commercial materials offer teachers a considerable variety of teaching resources to choose from'. O'Neill (1982, p. 105) agrees and talking again about his experience teaching English at a German shipyard, states that 'textbooks allowed me to adapt and improvise while I was teaching'. Richards (1993, p. 3) also stresses that because teachers have not invested any personal time in producing textbooks, textbooks, unlike school-produced material, 'can be replaced easily if a more interesting textbook comes along'.

Although this list of factors tends to focus on the teacher, one must not forget about the learner. Adamson and Lee (1994), when musing over the future role of EFL textbooks, conclude that one major reason for the dominance of textbooks over other forms of resources is the permanence and convenience offered by the book as a printed, centralised and portable collection of materials. O'Neill (1982, p. 107) sums up this

sentiment by saying 'no other medium is as easy to use as a book'. Another advantage afforded to learners by textbooks is highlighted by O'Neill (1982) too. Again talking about his experience in Germany, he states that a 'basic reason for using the particular textbooks that we had chosen was that the books made it possible for learners who, for various reasons, had missed lessons to catch up'. He stresses that textbooks can provide a framework for learners not only for revision purposes but also in terms of preparation for lessons.

3.3.2   Ideological considerations

In addition to the rather common-sense reasons discussed above, Richards (1993, p. 3) points out that a number of more subtle factors are also at play. He states that 'these relate to beliefs that teachers and others often hold about commercial materials, which serve to reinforce the status of textbooks in teaching'. One factor, of course, has already been touched upon on page 54 – the importance of Chinese neo-Confucian tradition.

One assumption, according to Richards (1993), is that publishers, academics and textbook writers are well placed to incorporate the latest findings about current theory and research into their materials. 'Teachers, themselves, it is argued, are likely to be unaware of current research and theory', he contends (p. 3). This contention is not new. As far back as 1928, Donovan (cited in Shannon 1987) wrote the following.

> One of the most potent factors in the spreading of the results of research is through a well prepared set of readers and their manuals.

The extent to which teachers in Hong Kong believe this is true is hinted at by Sampson (2001), who found that 74.4% of teachers believed that their textbook could help them implement the syllabus. Sampson is not able to discern whether teachers believe this because they know the books have been approved by the ED or because they believe that the writers of the course have done a good job in following the syllabus. This issue will be explored further in this study.

The obvious down-side to the assumption that textbooks can be relied upon to reflect current theories and research findings is the risk that teachers no longer believe that they themselves should attempt to keep abreast of current theories and research findings. This is one aspect of what is often quoted as the most serious negative impact of textbook use on teachers – the deskilling of teachers.

Another assumption given by Richards (1993) is that commercial materials are technically superior to teacher-made materials because they are more systematically and carefully prepared. Again, this assumption is not new. In 1936, Gray (cited in Shannon 1987) wrote the following.

> [Commercially] prepared materials are, as a rule, more skilfully organised
> and are technically superior to those developed daily in classrooms. Because
> they follow a sequential plan, the chance for so called 'gaps in learning' is
> greatly reduced.

Again, the obvious down-side to this assumption is that in the process of using textbooks, teachers give up control of what is being taught and slavishly follow the material and sequence of the textbook without improvisation and adaptation. As commented by Richards (p. 5), this 'leads to the notion of "teacher-proofing"[19] commercial materials' and is the source of another form of deskilling.

This reification of textbooks (that is the tendency for teachers to attribute qualities of excellence, authority and validity to published textbooks) Cunningsworth (1995) suggests may be more prevalent among teachers whose mother tongue is not English. This is another area that will be explored in this study.

3.4   The role of textbooks in defining the curriculum

As suggested above, textbooks almost certainly have some role in defining the curriculum. However, what exactly do we mean by the curriculum? Venezky (1992), drawing on the work of Goodlad et al (1979), defines five curricula for any subject area: the needed curriculum, the desired curriculum, the prescribed curriculum, the delivered

curriculum and the received curriculum. Let us look at each of these in turn, with definitions from Venezky (1992, pp. 439-440) and examples from the TOC Secondary English curriculum reform for the first three (see the table below).

The needed curriculum
'The needed curriculum is very often an amorphous entity, consisting of the more valued suggestions from philosophers from the discipline, curriculum specialists, politicians, blue-ribbon panels, and content area authorities.' *The needed curriculum in the TOC Secondary English curriculum reform was the opinions of the ED, the EMB and the group of English language experts from the Institute of Education led by John Clark (see Chapter 2).*
The desired curriculum
'The desired curriculum is the first place where operational issues are considered, but the influence of these issues is still weak. This curriculum is represented by various state and school district guidelines...' *The desired curriculum is the document titled Syllabuses for Secondary Schools: English Language Secondary 1-5 published by the CDC in 1999.*
The prescribed curriculum
'Next in the chain running from general to specific is the prescribed curriculum, which is the textbooks and other curricular materials that define or prescribe not only the contents of courses but also the sequence of topics and quite often the pedagogical strategies to employ in teaching them.' *The prescribed curriculum is the eight textbooks that were approved by the ED and which were first used in schools in September 2001.*
The delivered curriculum
'What teachers deliver in the classroom, with or without textbooks, is the delivered curriculum.'
The received curriculum
'... what students acquire as a result of classroom activity ... is the received curriculum.'

Table 2 The five curricula for any subject area with definitions from Venezky (1992, pp. 439-440) and examples from the TOC Secondary English curriculum reform for the first three

According to this categorisation, textbooks define the prescribed curriculum. Since we know that teachers in Hong Kong rely heavily on textbooks for teaching material, we may also surmise that a large part of the delivered curriculum is also defined by textbooks. This point gets to the heart of this thesis. To what extent can (and do) textbooks represent the needed and desired curriculum? What constraints stand in the way of this representation? Finally, can textbooks help to bring about curriculum reform or do they have the power to stand in the way of curriculum reform? To explore this issue, it is useful to start by looking at the set of Primary English textbooks that were produced for the Primary English TOC syllabus.

3.4.1   The prescribed curriculum for primary English

This section will look at the extent to which the textbooks that were produced for the primary English TOC syllabus (Key stages 1 and 2) followed the desired curriculum (and also, to a lesser extent, the needed curriculum). As mentioned in Chapter 2, it was commented by some teachers that they felt that the textbooks they were using were not written for TOC (Lo 2000), although to date no comprehensive survey of teachers' comments has been done to verify this.

Tong, Adamson and Che (2000) took another approach and examined the two series of books available themselves. They noted the following (p. 152).

> In a number of respects, neither series was very different from non-TOC
> predecessors. The textbook was the core, with a variety of resources available,
> such as workbooks, wall-pictures and audio cassette tapes – although an extra
> booklet called the Task Book was incorporated. There was thus little evidence
> of innovation in the range of resources ...

They go on to analyse the contents of the two series (which they label Series 1 and Series 2) and conclude that 'the resources did not mark a major shift towards task-based learning in the TOC context'. Some common complaints from these writers about Series 1 include (p. 153) that 'the role of tasks in the series is really as an add-on to the

language' and that many of the tasks are in fact 'exercise-tasks' (i.e. activities which place structured linguistic practice within a context) rather than the kind of tasks defined by the TOC syllabus (see Chapter 2). They also note that many of the tasks (p. 153) 'appear to be redundant in that they repeat what was done in the Pupil's Book' and that most of the Pupil's Books concentrate on exercises that present and practise discrete grammatical items, using the presentation-production-practice (P-P-P) approach (see Chapter 2, p. 48). They conclude that the arrangement of the material in this series (p. 153) 'corresponds to the *weak* conception of task-based learning'.

Looking at Series 2 (by another publisher), Tong, Adamson and Che conclude that (p. 154) 'While not being an example of full-strength task-based learning, the less peripheral role of tasks means that EL2 (Series 2) might be described as *quite strong* in this regard'. However, as with Series 1, they comment that the task design resembles the P-P-P approach rather than the TOC approach - which should be (p. 152) 'organised around holistic communicative acts (based on the pupils' need, interests and ability)' - and criticise the contrived nature of many of the activities.

The fact that these researchers could see such clear differences between the two courses points to one obvious but actually rather important point. Series of textbook resources can be produced for the same published curriculum, be approved by the same textbook review committee, but still vary quite considerably in the extent to which it is perceived that they fulfil the requirements of the curriculum. Of course, these 'perceptions' are the perceptions of academics. It is far more interesting to probe the perceptions of teachers (the end users of the materials), which is one thing this study will do.

Were these two series produced in line with the TOC curriculum? At this point, it is probably useful to make a distinction between the needed curriculum and the desired curriculum. As pointed out in Chapter 2 (p. 29), TOC was initially conceived of as a cross-curricular reform. In fact, one could argue that the basis of the 'needed curriculum' was cross-curricular reform based on the holistic development of individual pupils. From the fact that the TOC initiative was not extended widely to other subjects and

because it clearly flew in the face of local teaching practices and parental expectations, which tend to stress accumulation of academic knowledge within strong subject boundaries, one could say that the 'spirit' of TOC was lost in the publication of the desired curriculum. One could also argue that the overly prescriptive nature of the published syllabus either served to confuse readers or (what is perhaps worse) encourage them to focus on specific checklists rather than the overall nature of the curriculum reform. For example, in many of the Teacher's Books for both the primary and secondary textbooks the amount of space given over to describing and explaining 'why tasks are tasks' is almost as great as the space given over to the tasks themselves.

3.4.2   The publishers' perspectives

Tong, Adamson and Che (2000) interviewed representatives from both publishers. According to these researchers (p. 156), the 'publishers felt that they had a reasonable conception of TOC English Language, realising that the activities should be meaningful, purposeful and include experiential learning rather than just instructional learning. However, they found it difficult to find writers and experienced editors to develop suitable materials.'

Another concern voiced by the publishers was their lack of experience of preparing TOC materials. Although the published syllabus contained 'examplar materials' (a series of one-off tasks), there was little or no indication in the syllabus of how a whole course could be prepared. It was therefore very much left to the publishers to not only 'put the flesh on the bones' but, in a way, to also arrange the bones into a functional skeleton too! In this respect, the ED did offer some guidance as they allowed two submissions of material before making the final decision about which books would be recommended and which books would not. As commented by Tong, Adamson and Che (p. 156), 'While the publishers welcomed this co-operation, they found the feedback sometimes unclear, insufficient and even contradictory. They commented that the guidelines often changed, reflecting changes in other aspects of TOC as the reform was being prepared'.

According to Tong, Adamson and Che, the uncertain future of the TOC curriculum was also an important consideration for publishers. Their interviews with publishers showed that (p. 156) 'the publishers were reluctant to commit too much money to the development of TOC series, as there was no clear indication as to the actual nature of the curriculum once implemented – the publishers were well aware of the key role of the teachers in this respect'. This final comment is a very important one. The textbooks may represent the prescribed curriculum but it is teachers who ultimately control the delivered curriculum.

The comment about the importance of teachers is important for another reason too as it highlights an example of one of the 'commercial constraints' that act upon publishers. As pointed out by Venezky (1992, p. 440), 'the more capital required for entry into a particular textbook field, the less willing are the publishers to take risks on either content or methodology'. As commented in Chapter 2 (p. 44), Morris (2000, p. 9) pointed out that 'TOC contained a number of features that were in fundamental conflict with many of the structural features of the system of schooling and the school curriculum'. Since it is the teachers in a school who play a crucial role in choosing which textbooks are placed on the school's book list, it might therefore be expected that publishers would be cautious in the extent to which they incorporated TOC features if they felt these features might be unpopular with teachers.

Other commercial constraints revolved around the choice of media. Tong, Adamson and Che (2000, p. 157) comment that 'where TOC would advocate the use of interactive, flexible media, the published resources are still textbook-centred'. There are inherent risks for publishers in 'experimenting' with new media, particularly when it is clear that, as mentioned before, the use of books is widely supported in Hong Kong and in addition 'the structural features' of schools do not support the innovation, e.g. there are insufficient multimedia facilities within schools. Other likely considerations are the high investment necessary for multimedia resources, the ease of piracy, and the lack of experience in developing multimedia resources within such companies.

3.5 The role of textbooks during times of change

Much of the previous section focused on the role of textbooks in defining the curriculum. A related and equally pertinent 'thread' to this study is the role of textbooks during times of change, specifically whether they can be 'agents of change'. Hutchinson and Torres (1994, p. 321), talking about the process of change in ELT, make an interesting observation.

> The fundamental problem of change is that it disturbs the framework of meaning by which we make sense of the world. It challenges, and thereby potentially threatens, the values, attitudes, and beliefs that enable us to make experience meaningful and predictable.

Other researchers echo this sentiment (Marris 1986, Blackler and Shimmin 1984) and conclude that the following conditions are necessary for smooth and effective change.

1 People can only tolerate a certain amount of change at one time. People need time in order to take new ideas and experiences 'on board' and add them to their 'network of meaning'.

2 People need time to adjust to change. If necessary, they need to be relieved of some of their normal workload in order to accommodate the change. They also need reassurance and support.

3 People need to be given some idea of what the change will be like in practice in order to reduce their feelings of insecurity about the change.

4 People need the support of groups since individuals find it difficult to carry the burden of change alone.

Since a common 'theme' running through all the questions above is the need for security, some have argued (Hutchinson and Torres 1994, p. 322) 'that the most effective agents of change will thus be those that can create the supportive environment in which teachers will feel able and willing to take on the challenge of change'. Their conclusion is that textbooks can do this because (referring back to the points above) they can introduce changes gradually within a structured framework, they can provide support and a relief from other burdens, they can provide a picture of the change in

practice and, because textbooks tend to be adopted by groups of people individual teachers, are relieved of the burden of introducing changes by themselves. This last point is supported by a study by Torres (1994) in the Philippines, who found that many English for special purposes (ESP) teachers supported a new English teaching programme (English for Fisheries Project) because the textbook for the course was supported by satisfied teachers and college administrators and also involved a network of eight regional state colleges.

Stronger, more direct evidence, is provided by Van den Akker (1988), who looked at the implementation of a new enquiry-based primary science curriculum in Holland. Two groups of teachers were given different materials to teach with. One control group's materials were loosely structured, gave many divergent ideas, suggestions and options, and considerably less guidance about necessary resources and the organisational aspects of lesson preparation and execution. The experimental group's materials had fewer options, more comprehensive discussion of the sequence of activities, time estimates and the function of each stage of the lesson. Data was collected from the two groups. The data analysis centred on two issues: to what extent the lessons were conducted in accordance with the curriculum developer's original intentions; and to what extent the teachers perceived the lessons and the learning results to be successful.

Van den Akker found that the experimental group's lessons were much closer to the intentions of the curriculum developers and were successful in maintaining this approach throughout the lesson. In contrast, the teachers in the control group (Van den Akker, p. 53) 'often lost their grip on the stream of events and were overwhelmed by them, or restricted themselves to handling organizational problems and assumed a more withdrawn attitude'. Furthermore, the experimental group reported greater satisfaction with their materials, their lessons and their performance.

Finally, in what could be argued is an important insight into the received curriculum, Van den Akker found that (p. 53) 'there was a large difference between the "time on

64

task" of the pupils. In the experimental group they spent about 50% more time on active work in their building tasks.'

Van den Akker concluded that a highly structured approach is an effective way of getting curriculum change into the classroom. He also postulated that, although his research was only concerned with the implementation phase, the change was more likely to be permanent (Van den Akker 1988, p. 54) 'if earlier experiences had been satisfying and yield positive results' [sic].

3.6   Conclusion

The results of this literature review show that, although 'reviled' in some quarters largely because of the claim that they cause the 'deskilling' of teachers, textbooks are extremely widely used not only in Hong Kong but also around the world. There is some evidence to show that the 'structure' offered by a textbook can not only help non-native speaking English teachers but also less experienced teachers. There is also limited evidence to show that textbooks, due to their structured nature, could actually be important agents of change (assuming of course that they are written in line with the intentions of the curriculum developers). This study will largely look at that issue by exploring secondary English teachers' perceptions of whether the books developed for the secondary English TOC syllabus (Key stage 3) followed the new syllabus and, importantly, whether the new books had helped them to implement the new syllabus. The details of the investigation are presented in the following chapter.

CHAPTER 4   DESIGN AND METHODOLOGY

As discussed in Chapter 1, the main aim of the study was to explore the role of publishers in curriculum change by asking teachers about the perceptions and beliefs they held about the new TOC secondary English syllabus, the textbook that they had used to teach the new syllabus (either *English Treasure* or *Longman Target English*), and publishers. In addition, the opportunity was also taken to enquire about teachers' perceptions of the purpose(s) of the EMB textbook review process, and to repeat some existing studies about textbook use.

4.1   The research questions

The study sought to answer the following specific research questions.

1   Are teachers confident that they are familiar with the aims of the new syllabus?

2   How successful do teachers think the implementation of the new syllabus has been?

3   Do teachers feel that their textbook helped them to implement the new syllabus?

4   What percentage of class time do teachers spend teaching with commercially produced materials and is this affected by variables such as experience, training, banding of the school and being a NET/native speaker?

5   Are teachers aware of the purpose of the EMB textbook review process?

6   Do teachers feel that publishers understood the aims of the new syllabus?

7   Do teachers feel that publishers helped teachers to understand the new syllabus?

8   Can publishers (through the publishing of textbooks) influence teachers' perceptions of a new syllabus and in doing so help to promote curriculum change?

4.2   The subjects of the study

The subjects of the study were 78 Form 1 and/or Form 2 Secondary English teachers from 14 schools (39 teachers from 6 schools using *English Treasure* and 39 teachers from 8 schools using *Longman Target English*). At the time of the investigation, the teachers had been using the textbooks for one year and one term.

4.2.1 Response rate

When the questionnaires were handed out to the 14 panel chairs, it was requested that all the teachers in the school teaching Form 1 and/or Form 2 should fill in the questionnaire (a total of 102 teachers). A total of 84 questionnaires were returned (representing a response rate of 82%). However, upon further inspection, 6 of these 84 were deleted from the analysis: 3 of the teachers did not appear to teach either Form 1 or Form 2 (and therefore were not part of the target 102 teachers teaching Form 1 and/or Form 2), 1 had ticked '6' for everything, 1 said they didn't know what the new syllabus was and therefore couldn't fill it in, and 1 only completed half the questionnaire). After deletion of these 6 questionnaires, the response rate fell to 76%.

4.2.2 Choice of schools

The two groups of schools were matched as closely as possible in terms of a number of important variables. For example, all the 14 participating schools were Chinese medium of instruction (CMI) as opposed to English medium of instruction (EMI) schools and all fell within Bands 3-5 (under the 'old' banding system)[20].
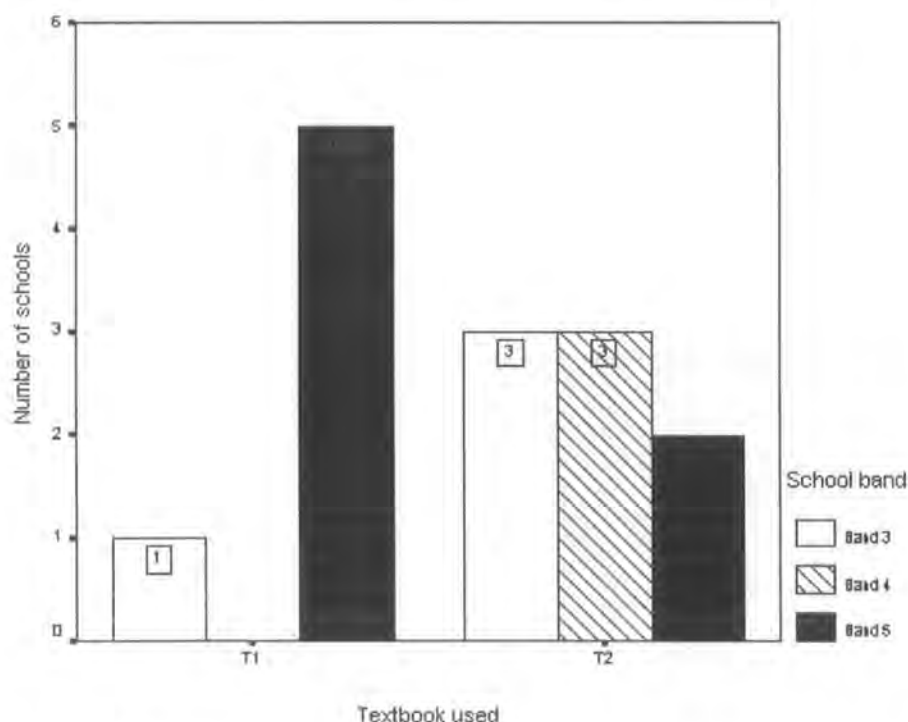
Figure 2 The distribution of banding for the two participating groups of schools (T1 = *English Treasure*, T2 = *Longman Target English*)

Although all schools fell within Bands 3-5, as can be seen in Figure 2, the match between the two groups in terms of banding is not perfect. Proportionally more of the *English Treasure* schools were Band 5 schools compared with the *Longman Target English* schools. Although a little unfortunate, the mismatch was largely unavoidable due to the relatively small size of the total population of the *English Treasure* users and the fact that this textbook is particularly popular among Band 5 schools.

The two groups of schools matched more closely in terms of their geographical locations (see Figure 3), which was deemed a more important variable to control for and, in the selection of schools, took precedent over the banding, which is always very arguable being essentially an unofficial measurement.
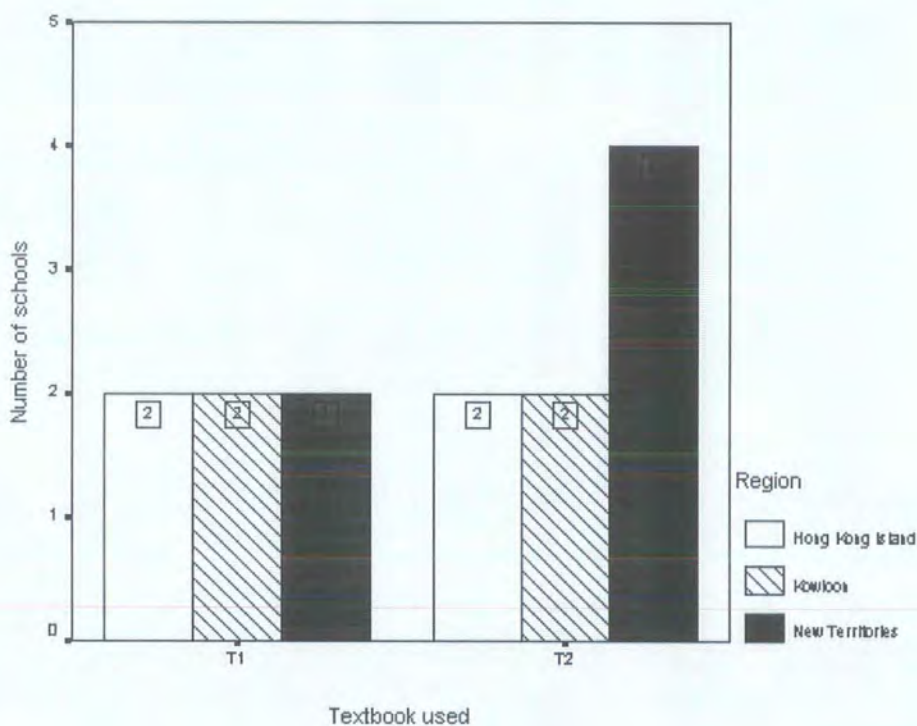
Figure 3 The distribution of geographical locations for the two participating groups of schools (T1 = *English Treasure*, T2 = *Longman Target English*)

4.2.3   Choice of teachers

All teachers who taught Form 1 and/or Form 2 were asked to participate in the study (see p. 78 for details). The experience, level of training, and number of (regular) English teachers (non-NET), panel chairs and NETs in each group are shown below in Figures 4-6.
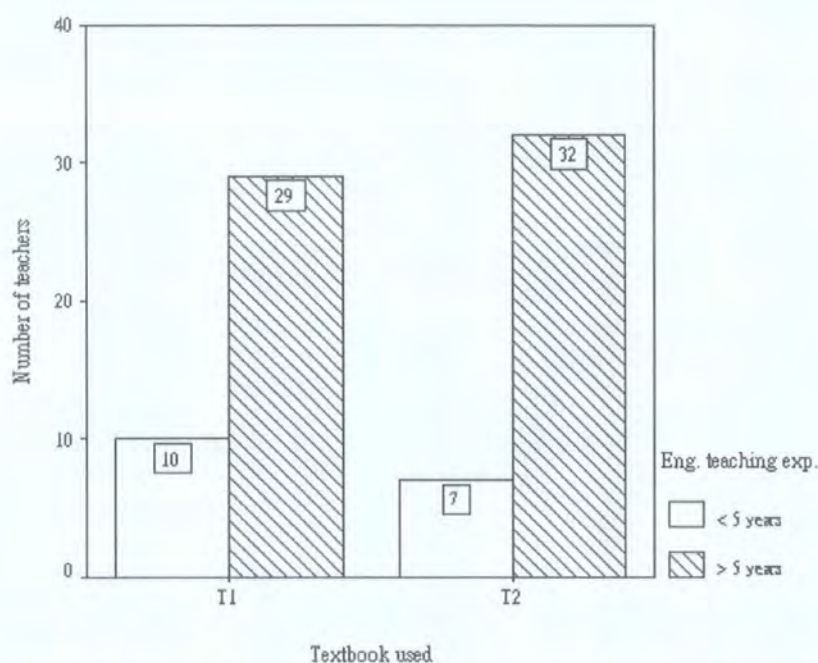
Figure 4 The distribution of English teaching experience for the two participating groups of teachers (T1 = *English Treasure*, T2 = *Longman Target English*)

The graph above shows a similar distribution of teaching experience between the two participating groups of teachers. Since the response rate was relatively high at 76%, it also suggests that neither of the groups of schools were made up of particularly inexperienced teachers.

The questionnaire also asked whether teachers were subject trained or not. It was found that 28.2% of the teachers using *English Treasure* were not subject trained compared with 20.5% of the teachers using *Longman Target English*. Although the Education and Manpower Bureau (2002) report that 86% of secondary teachers hold a degree (i.e. 14% do not), no figures are available about the number of teachers holding a relevant degree so it is impossible to judge whether these figures are particularly unusual or not.
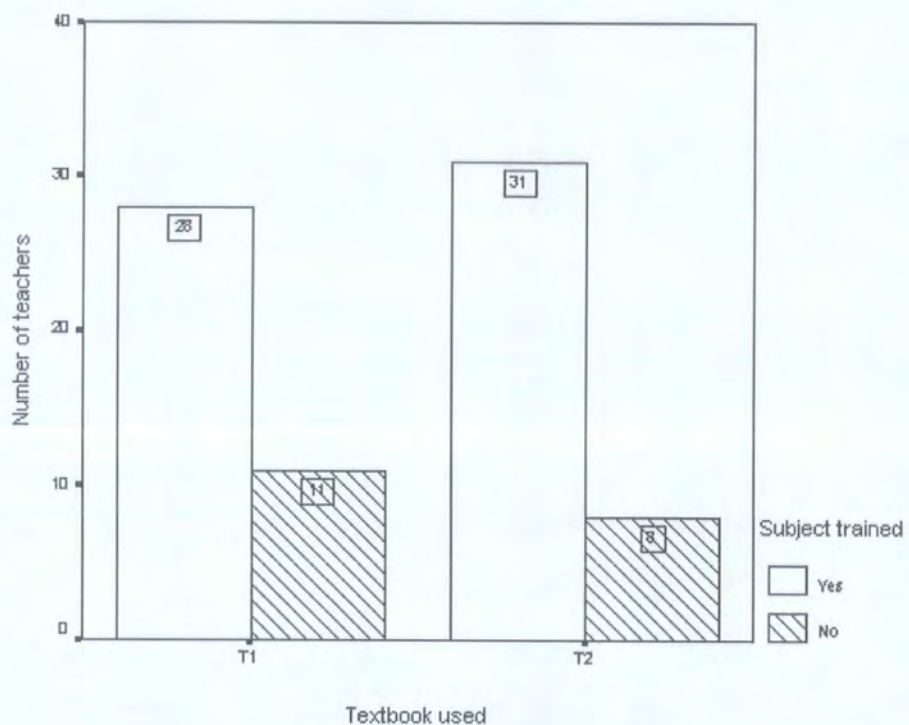
Figure 5 The distribution of subject training for the two participating groups of teachers (T1 = *English Treasure*, T2 = *Longman Target English*)
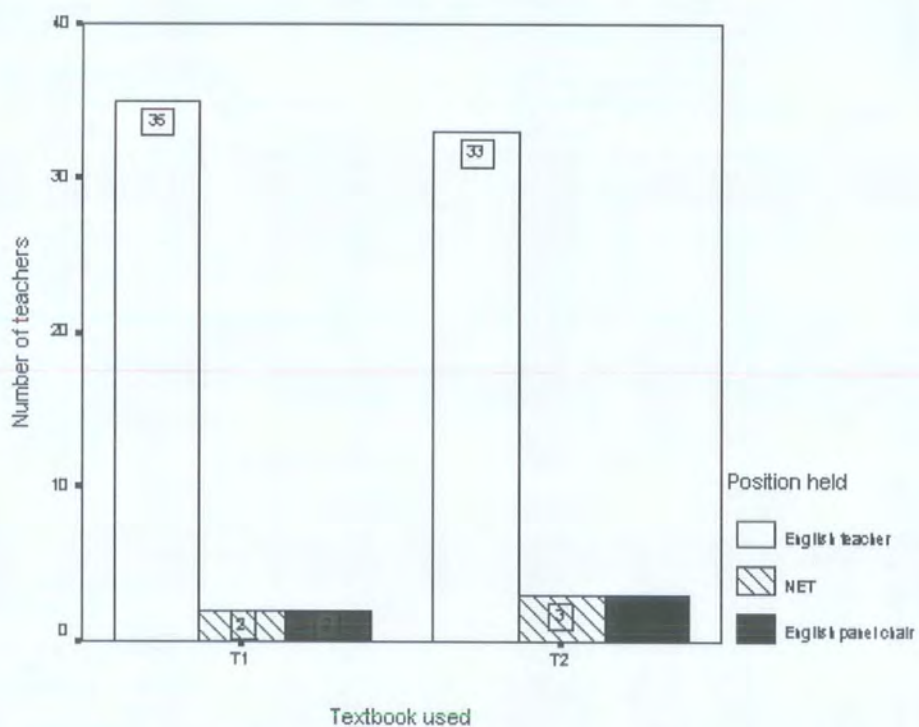
Figure 6 The distribution of English teachers, NETs and panel chairs for the two participating groups of teachers (T1 = *English Treasure*, T2 = *Longman Target English*)

The distribution of English teachers, NETs and panel chairs shows a surprisingly small number of NETs and panel chairs participated in the questionnaire. Since all schools must have a panel chair and all these schools had a NET, a total of 5 NETs and 5 panel chairs means that only 35.7% of the total filled in the questionnaire (compared with the average response rate of 76%). It is interesting to speculate why this might be so.

The relatively small number of panel chairs filling in the form could be explained by the fact that they may have felt uncomfortable committing their opinions about such a relatively sensitive subject to paper given their leadership role and status in the school. In addition, despite the promise of anonymity, they may also have been uncomfortable about the fact that their questionnaire could easily have been identified.

The relatively small number of NETs is probably a result of different factors. Many NETs are employed within schools to teach oral lessons. These teachers don't tend to use textbooks and therefore may not have been given a questionnaire by the panel chair. Some NETs are only given the senior forms to teach, again a reason for exclusion.

4.2.4   Potential ethical issues in the selection of subjects

In order to be able to extrapolate any finding from the research to the general population of Band 3-5 teachers in Hong Kong, one must be satisfied that the subjects being studied represent a typical section of this teaching population and that there has been no evidence of bias in their selection.

The schools used in the study were selected using random stratified selection. That is, three schools from a list of user schools for each textbook from each of the major geographical regions in Hong Kong (Hong Kong Island, Kowloon and the New Territories) were selected randomly and approached. Three of the *English Treasure* schools (one from each region) declined to participate. Two of the *Longman Target English* schools (one from Kowloon and one from the New Territories) declined to participate. The following reasons were cited: the teachers being too busy (4 schools) and the principal not approving of teachers filling in questionnaires (1 school).

71

When it became apparent that the questionnaire response rate of the *English Treasure* schools was going to be higher than the response rate for the *Longman Target English* schools, and therefore that there would be relatively few questionnaires from users of *Longman Target English*, it was decided to randomly select another school. This move accounts for why there are four Hong Kong Island schools in the *Longman Target English* group.

Given the fact that the researcher is affiliated with one of the publishers – Longman – (and teachers were aware of this), one must ask oneself the question to what extent this might have affected the panel chair's decision to participate, i.e. whether this was a source of bias in the selection of schools. Since the schools were randomly selected (within geographical regions) and a similar numbers of schools accepted the invitation to participate, it would suggest that this was not an issue. In fact, on the contrary, it could be argued that *English Treasure* users were actually more enthusiastic based on their higher response rate.

In terms of which teachers responded to the request to fill in the questionnaire, the decision to do so or not is probably more related to the teachers' relationship with their panel chair and the extent to which the panel chairs encouraged the teachers to participate. The potential for bias in this respect would also appear to be minimal.

4.3   Mode of investigation

Two distinct modes of investigation are commonly identified: quantitative and qualitative. Although some researchers believe that employing different methodological paradigms within one study can lead to unreliable findings, others consider the distinctions to be overstated and believe that 'there is ... no necessary link between choice of method and logic of enquiry' (McDonough and McDonough 1997, p. 222).

This researcher prefers to follow the school of thought propounded by Seliger and Shohamy (2000, p. 122), who state that different research methods can be used within one study to 'compile a more complete picture of the activity or event being described'.

Both quantitative and qualitative methods are used in this study not only because it is felt by this researcher that a sharp distinction between the two is unhelpful but also in order to supply what Eisner (1991, p. 110) calls 'structural corroboration'.

There are therefore two parts to this investigation.

1 A questionnaire which was sent to 102 teachers at 14 schools

2 Follow-up interviews with 11 teachers (from 11 of the 14 different schools who participated in the study). Of the 11, 4 used *English Treasure* and 7 used *Longman Target English*)

4.4   The questionnaire

4.4.1   The advantages of questionnaires

There are several advantages to collecting data though the use of questionnaires. One advantage is that questionnaires can be 'used to collect data on phenomena which are not easily observed' (Seliger and Shohamy 2000, p. 172). Since this study focuses on teachers' attitudes, opinions and ideas, this makes the questionnaire a useful device. Also, since 'the knowledge needed is controlled by the questions ... it affords a good deal of precision and clarity' (McDonough and McDonough 1997).

Other important advantages include the fact that questionnaires are particularly suitable for 'collecting data from large groups of subjects' (Seliger and Shohamy 2000, p. 126) in a relatively quick and inexpensive manner (Bell 1999). Finally, because questionnaires are anonymous, they encourage participants to be honest and to avoid face-saving behaviour.

4.4.2   The limitations of questionnaires

Questionnaires are not without limitations though. The response rate for self-report questionnaires can be low, particularly if there is no incentive for respondents to complete them or if respondents fail to fill in the questionnaire completely. Another problem stems from the fact that the researcher is not available to answer queries or clarify points if the respondent fails to understand any part of the questionnaire. Of

course, a high level of literacy in the language in which the questionnaire is presented is also a prerequisite. It is therefore essential that a questionnaire is as clear and unambiguous as possible (Cohen and Manion 1994) and that a questionnaire is piloted among a sample of respondents in order to uncover any potentially problematic areas before it is too late.

4.4.3   The design of the questionnaire used in this study
The questionnaire used in the study was devised specially for this investigation and comprised three sections (see Appendix 1).

The first section asked respondents for personal information using a series of tick-box type questions. It also provided an opportunity to double-check important details such as forms taught and the choice of textbook.

The closed questions in the second section comprised multiple-choice questions concerning areas of interest plus a final question in which teachers were asked to prioritise a set of statements. The use of fixed-alternative questions in the first part of the second section gave the respondents specific and limited alternative responses in the belief that these questions are easier to answer and also easier for the researcher to code, tabulate and interpret. Where it was deemed probable that respondents may wish to add their own comments, such an opportunity was given (see Question 4 of the second section). In the second part of the second section, a different format of question was used in order to allow teachers to prioritise their beliefs. Just in case the options failed to express teachers' beliefs fully, respondents were given an opportunity to add to the options (see Question 5 of the second section).

The 36 statements used in the third section of the questionnaire were developed around nine scales (with four items written for each scale) with the aim of devising a summated rating scale[21]. The nine scales (and their corresponding items) are presented in Table 3.

Scale 1: The new syllabus is relevant to students' lives.
1 The new syllabus is relevant to students' lives.
5 The new syllabus encourages the use of everyday language.
18 The new syllabus does **NOT** encourage the teaching of everyday English. *
32 The new syllabus covers material that is part of students' lives.

Scale 2: The new syllabus is contextualised.
10 The new syllabus encourages students to learn English within a context.
16 The new syllabus encourages communication within genuine situations.
25 The new syllabus does **NOT** encourage language use in authentic situations. *
28 With the new syllabus, students use the language within contextualised situations.

Scale 3: The new syllabus has clear learning targets.
8 The new syllabus clearly defines the purposes of learning English through the use of targets.
17 With the new syllabus, the learning targets are stated more clearly.
21 The new syllabus encourages learners to work according to specific learning targets.
29 The new syllabus does **NOT** have clearly stated learning targets. *

Scale 4: The new syllabus encourages experiential learning.
2 The new syllabus encourages 'learning through doing' rather than rote learning.
15 The new syllabus is based upon experiential learning.
22 With the new syllabus, students learn from the experience of completing meaningful learning activities.
35 The new syllabus encourages rote learning. *

Scale 5: The syllabus is task-based.
3 The new syllabus encourages the use of meaningful tasks.
12 With the new syllabus, students are **NOT** encouraged to complete meaningful tasks. *
24 With the new syllabus, students' learning is focussed upon the completion of tasks.
30 The new syllabus places emphasis on learning to communicate through purposeful tasks.

Scale 6: My textbook is written in line with the new CDC syllabus.
9 Our textbook is written in line with the new CDC syllabus.
13 Our textbook follows the guidelines laid down in the new syllabus.
23 Our textbook does **NOT** reflect the aims of the new syllabus. *
33 Our textbook is designed to support the new syllabus.

Scale 7: My textbook has helped me to implement the new syllabus.
4 Our textbook has helped me to implement the new syllabus.
11 Our textbook has made implementing the new syllabus difficult. *
20 Our textbook has made teaching the new syllabus easier.
34 Our textbook has facilitated the implementation of the new syllabus.

Scale 8: Publishers have helped me to understand the new syllabus.
7 Publishers helped explain the new syllabus to teachers.
14 Publishers held useful seminars/workshops to explain the new syllabus.
19 Publishers did **NOT** help me to understand the new syllabus. *
36 Publishers helped me to understand the new syllabus.

Scale 9: Publishers are knowledgeable about the new syllabus.
6 Publishers understand the aims of the new syllabus.
26 Publishers were a good source of information about the new syllabus.
27 Publishers are knowledgeable about the new syllabus.
31 Publishers do **NOT** understand the aims of the new syllabus. *

Table 3 The nine scales used in the questionnaire and their corresponding items (* = a negatively worded item)

Spector (1992, p. 7) advises that the 'development of a summated rating scale is a multistep process' which should start with the construct of interest being 'clearly and precisely defined'. He goes on to add that a 'scale cannot be developed until it is clear exactly what the scale is intended to measure'.

As shown above, the constructs of interest fall into three categories: beliefs about the new syllabus, beliefs about the teachers' textbook, and beliefs about publishers in

general. The categories were designed to best answer the research questions presented on page 64.

The first category posed the most serious problems in terms of construct definition since in this category the researcher attempted to 'encapsulate' what she considered to be the 'most significant' aspects of the new syllabus. Following advice given by Spector (1992, p. 14), the existing literature was used as a starting point for construct definition, in particular the TOC English Language Syllabus for Secondary Schools (Curriculum Development Council 1999). Five scales were selected based on frequently referred to aspects of the syllabus (particularly those aspects that were frequently referred to when explaining the differences between the old and the new syllabus).

The second step according to Spector (1992, p. 18) is to design the scale, which includes deciding on the number and nature of the response choices, writing the item stems, and writing the instructions to respondents. With regard to the response choices, it was decided to use agreement response choices (which were bipolar and symmetrical around a neutral point). Respondents were asked to indicate if they agreed or disagreed with each item as well as the magnitude of their agreement or disagreement.

It has been argued (Rust and Golombok 1992, p. 154) that there is a tendency for respondents to show 'indecisiveness' when answering questionnaires and to avoid either agreement or disagreement by opting for the middle category. This is supported by Walonick's (1997) finding that questions that exclude the middle option produce a greater volume of accurate data. It was therefore decided to omit the middle option in this study and to use the equally spaced agreement modifiers 'strongly', 'quite a lot', 'moderately' and 'slightly' to provide eight options (Spector 1976). As pointed out by Spector (1980), although equally spaced modifiers are not essential, respondents may find the questionnaire easier to answer if they are. The results are also easier to analyse.

The item stems were written as declarative statements that respondents could either agree or disagree with. As noted by Spector (1992, p. 23), 'a good item is one that is

clear, concise and unambiguous, and as concrete as possible'. Efforts were therefore made to ensure that each item expressed only one idea, and that colloquialisms, expressions and jargon were avoided. In particular 'buzzwords' from the syllabus were also avoided to prevent teachers from reacting 'instinctively' to statements.

4.4.4   Piloting

The third major step in developing a summated rating scale is to pilot it with a small number of respondents. This was done with a group of twenty teachers who completed the questionnaire and then gave feedback about which items were difficult to answer or simply difficult to understand. As a result of the feedback a few statements were clarified and in response to the fact that most people went for 'Agree moderately', the number of response choices was increased from six to eight (see Appendix 1).

Also, since a number of people said that they had forgotten which side was 'Disagree' and which side was 'Agree' by the time they got to the second sheet of statements, the response choices were clearly labelled with a 'D' or an 'A', i.e. D 1 2 3 4   5 6 7 8 A. A double space was also added between the four 'Disagree' options and the four 'Agree' options for clarity (see Appendix 1).

4.4.5   Procedure

The questionnaires were handed out by the 14 panel chairs who agreed to participate in the study. The panel chairs then collected them after completion and returned them. A covering letter was attached both to the front of the questionnaire (addressing those filling in the questionnaire – see Appendix 2) and a separate letter was attached to the batch (addressing the panel chair – see Appendix 3).

The manner in which the data from the questionnaires was analysed and the results of this part of the investigation are given in Chapter 5.

4.4.6　Potential ethical issues surrounding the questionnaire

Sackett (1979) reviewed a number of medical studies and identified 56 possible 'biases' that may arise in analytic research. Of this 56, over two-thirds were related to study design and execution. As pointed out by Jones (2000), it is these errors that are particularly serious as 'Errors in analysis or interpretation can usually be rectified, if detected in time (for example, before publication), but deficiencies in design are nearly always irremediable'.

One clear source of bias in the design and execution of this study is the sampling procedure, which was discussed earlier in this chapter. Another is in the wording and structure of the questionnaire itself. To ensure that the questionnaire was worded in such a way that it did not make unfair assumptions, nor favour or prejudice any particular group of teachers, the questionnaire was scrutinised by three external parties and found to be fair.

4.5　The interviews

The interviews with teachers were semi-structured. That is, as defined by Seliger and Shohamy (2000, p. 167), they included 'specific core questions determined in advance from which the interviewer branches off to explore in-depth information, probing according to the way the interview proceeds, and allowing elaboration, within limits'.

4.5.1　The advantages of semi-structured interviews

The big advantage of semi-structured interviews is that they offer the researcher the flexibility to explore any area that emerges. The scope of the interview is therefore not limited to an area predefined before the interview. It is for this reason that this methodology is considered by many (McDonough and McDonough 1997, p. 184) to be 'closer to the qualitative paradigm because is allows for richer interactions and more personalised responses than ... the interviewer armed with entirely pre-coded questions'. It is also this researcher's personal experience that the closer an interview can get to a 'chat' the more truthful the interviewee becomes.

4.5.2   The limitations of semi-structured interviews

There are a number of limitations to semi-structured interviews. One, of course, is the danger that the interview loses its focus and, as a result, becomes either unproductive or very long. There are, of course, several logistic problems associated with conducting interviews. They are often difficult to arrange and, once arranged, time consuming to do. For this reason, the sample size is usually small and this study is no exception.

4.5.3   The scope of the interviews used in the study

The interviews in this study offered not only the opportunity to follow up on some of the issues that emerged from the questionnaire data but also the opportunity to gain a more in-depth understanding of teachers' beliefs and perceptions. Although largely used in an ancillary role in this study, they also served to help triangulate the data gathered from the questionnaires. The areas of investigation were:

- beliefs about the success of the new syllabus
- familiarity with the aims of the new syllabus
- implementation of the new syllabus
- knowledge of the textbook review process
- choice of textbook and beliefs about publishers in Hong Kong

A detailed interview schedule is provided in Appendix 4.

4.5.4   Piloting

The interview schedule was piloted with 2 teachers. The wording of the questionnaires was found to be acceptable.

4.5.5   Procedure

Approaches were made to the panel chairs of the 14 participating schools. In the approach, it was made clear that the interview could be conducted with any of the English teachers teaching Forms 1 or 2. Eleven of the schools accepted the invitation (4 teachers using *English Treasure* and 7 teachers using *Longman Target English*). The remaining 3 schools (2 using *English Treasure* and 1 using *Longman Target English*)

80

declined to be interviewed, citing lack of time. This excuse was particularly understandable given the fact that the interviews were conducted at the time that the school were starting to open to students again following their closure due to the outbreak of severe acute respiratory syndrome (SARS) in Hong Kong.

In the end, the 11 subjects included 7 panel chairs, 2 regular (local) teachers and 2 NETs. In the cases where the panel couldn't or didn't want to do the interview, he or she selected the 'substitute'. The interviews were conducted individually in the teacher's own school, and were recorded and later transcribed. Each interview lasted about 30 to 45 minutes. The experience of the teachers ranged from 8 to 18 years and all were subject trained.

Although in setting up the appointments with teachers it was made clear that any English teacher teaching F1-2 could be interviewed, it was interesting to see that the panel chairs preferred to be interviewed themselves rather than delegating the 'job' to others in the panel. In fact, more panel chairs came forward to be interviewed than filled in the questionnaire (see page 70). Why this should be so is of course impossible to know but it could reflect the hierarchical structure within schools. Panel chairs are often the point of 'first contact' with outsiders – a point elaborated upon further by one of the NETs in the interviews and discussed together with the rest of the results in Chapter 6.

4.5.6   Potential ethical issues surrounding the interviews

As with previous sections of this chapter, the main aim of this section about ethics and interviews is to explore any potential areas of bias that may arise as the result of the researcher's affiliation with one of the publishing companies – Longman. It was hoped that by considering them early in the research process they could be avoided at least as far as possible.

As pointed out by Walford (2001, p. 87), the nature of the interview is 'by all accounts, an unusual affair in that the socially accepted rules of conversation and reciprocity between people are suspended'. As also pointed out by Walford (ibid), the interaction is

81

also unusual because each party enters the interaction with their own expectations and to an extent an 'agenda'. The agenda may be expectations of what will be said. Within Chinese societies, it may also be expectations of behaviour, in particular face-saving and face-giving behaviour.

Dignity, self-respect, prestige and honour are all synonyms for 'face'. Expected face-saving behaviour on the part of the interviewees might be expected to include not wanting to appear a less than good English teacher in front of a native English speaker. Expected face-giving behaviour on the part of the interviewee might be the wish to not 'hurt the feelings' of the interviewer by saying 'bad things' about either publishers or textbooks in general, and the interviewer's company and books in particular. It is clear that both of these must be expected and 'handled' as best as possible.

Of course, there is another possible source of bias: the interviewer's own bias. During the interviews, the interviewer must be prepared to hear opinions that will likely differ from her own. The interviewer must be prepared to probe but not defend, to listen and not judge. In short, the interviewer must be clear from the start that this is an unusual social interaction and modify her communicative strategies accordingly.

CHAPTER 5   DATA ANALYSIS AND RESULTS (QUESTIONNAIRES)

The data from the questionnaires was entered into the statistical software package SPSS and analysed. Although Jones (2000) suggests that the data should be analysed 'according to the original design', it was decided here to analyse the data according to the research questions presented on page 66, the justification being that much of the questionnaire (including many of the scales) relates to the final research question (a comparison of the two groups of textbook users) and therefore was never intended to be looked at in isolation.

5.1   Familiarity with the aims of the new syllabus

Question 2 of the questionnaire asked teachers how confident they were that they were familiar with the aims of the new syllabus. They were asked to tick one of three boxes labelled 'Very confident', 'Quite confident' and 'Not at all confident'. Of the total population, analysis showed that the majority (59%) felt 'quite confident', a relatively small 6% felt 'very confident', and the remainder (35%) felt 'not at all confident'.

Of course, it would be interesting to consider whether there is a significant association between this variable (familiarity with the aims of the new syllabus) and variables such as position held in the school (i.e. regular teacher, NET, panel chair), school band, English teaching experience and training. Since the data is looking for statistical significance between nominal and interval level data, the chi-square test would be most appropriate. However, upon further investigation it was found that for each association the test was invalid because the frequency of cases was below the minimum of five cases per cell.

5.2   Success of the new syllabus

Questions 4 asked teachers how successful they thought the implementation of the new syllabus had been in their school. They were asked to tick one of three boxes labelled 'Very successful', 'Quite successful' and 'Not at all successful'. If they answered 'not at all successful', they were encouraged to indicate why they thought this. Of the total

population, none answered 'very successful', with the majority (74%) answering 'quite successful' and 26% reporting that the implementation was 'not at all successful'. Sixteen of the teachers provided a reason why they thought it had not been successful, and these reasons are given below.

Comments written by teachers on the questionnaires
⦾ *Students could not learn what they should learn*
⦾ *It is not suitable for Band 5 school*
⦾ *Students are not interested in English at all*
⦾ *Not all colleagues know the new syllabus*
⦾ *The aims and objectives are too vague*
⦾ *Lack support*
⦾ *Insufficient resources are provided*
⦾ *The tasks are quite time-consuming*
⦾ *Not know what it is*
⦾ *Too time-consuming when implementing task-based learning*
⦾ *The curriculum is determined by exams, not ED or glossy documents*
⦾ *Most of the students are weak in the subject. They cannot manage to complete the tasks provided*
⦾ *No idea of what the aims are, so unable to assess*
⦾ *1) insufficient collaborative work at work 2) lack of strong and good leadership 3) insufficient time for staff to upgrade their English competence and proficiency*
⦾ *Some teachers can't tell the difference in the old and new approach. I haven't seen any evidence of different teaching methods.*
⦾ *Not practical and time-consuming*

Table 4 Comments gathered from teachers to explain why they thought the new syllabus had not been a success in their school

Unfortunately, as with the previous section (5.1), it was found that there were insufficient cases to use the chi-square test to look for associations between this variable

(success of the new syllabus) and position held, school band, English teaching experience and training, although doubtless the results would be interesting.

5.3 Helpfulness of textbook in implementing the new syllabus

There were four statements on the questionnaire that attempted to gauge whether the teachers thought their textbook had helped them to implement the new syllabus or not. The teachers responded to these statements in the following way.

Statements	Disagree strongly	Disagree quite a lot	Disagree moderately	Disagree slightly	Agree slightly	Agree moderately	Agree quite a lot	Agree strongly
Our textbook has helped me to implement the new syllabus. (N=77)	0%	1.3%	2.6%	11.7%	29.9%	39.0%	15.6%	0%
Our textbook has made implementing the new syllabus difficult. (N=77)	2.6%	5.2%	14.3%	32.5%	20.8%	20.8%	3.9%	0%
Our textbook has made teaching the new syllabus easier. (N=78)	0%	1.3%	5.1%	5.1%	38.5%	35.9%	14.1%	0%
Our textbook has facilitated the implementation of the new syllabus. (N=77)	0%	1.3%	1.3%	10.4%	32.5%	40.3%	14.3	0%

Table 5 Responses to the four statements that asked about the helpfulness of the teachers' textbook in implementing the new syllabus

Aggregating the ratings, it was found that 84.5% of teachers agreed with the statement that 'Our textbook has helped me to implement the new syllabus' – with 15.6% agreeing 'quite a lot'. With respect to the other statements, 54.6% disagreed with the negatively worded 'Our textbook has made implementing the new syllabus difficult', 88.5% agreed with the statement 'Our textbook has made teaching the new syllabus easier' and 87.1% agreed with the statement 'Our textbook has facilitated the implementation of the new syllabus'.

5.4 Percentage of time spent teaching with commercially produced materials

Question 1 asked teachers what percentage of class time they spent teaching with commercially produced materials. The results are summarised in Table 6.

Time spent	20% or less	20-40%	40-60%	60-80%	80-100%
Proportion of teachers	11.7%	10.4%	22.1%	35.1%	20.7%

Table 6 Percentage of time spent teaching with commercially produced materials (N=77)

Again, as with the data presented in sections 5.1 and 5.2, it was impossible to test whether there was significant association between this variable (percentage of time spent teaching with commercially produced materials) and position held, school band, English teaching experience and training, due to the small sample size.

5.5 Purpose of the EMB textbook review process

Question 5 of the questionnaire asked teachers about the purpose of the EMB textbook review process. It asked them to rank a series of statements in order of importance (with 1 being most important). Of the 72 teachers who answered this section, 43% of them indicated that in their opinion the most important purpose of the EMB textbook review process was to ensure that textbooks contain accurate language. 30.6% indicated that ensuring that textbooks do not contain inaccurate information was the most important purpose.

The two statements related to fulfilling the requirements of the syllabus were placed in first place relatively infrequently (ensuring that the learning tasks/exercises fulfil the requirements of the syllabus – 12.5%; ensuring complete coverage of the learning targets/objectives in the syllabus – 11.1%) although the first of these two statements was placed in second place in 43.3% of the questionnaires.

The overall impression from these results is that teachers believed that the main purpose of the EMB textbook review process was to ensure accuracy (either accuracy of

86

language or accuracy of information) although clearly they also believed that checking that the books fulfilled the requirements of the syllabus was important too.

5.6   Publishers' knowledge of the new syllabus

There were four statements on the questionnaire that attempted to gauge whether the teachers thought that publishers were knowledgeable about the new syllabus. The teachers responded to these statements in the following way.

Statements	Disagree strongly	Disagree quite a lot	Disagree moderately	Disagree slightly	Agree slightly	Agree moderately	Agree quite a lot	Agree strongly
Publishers understand the aims of the new syllabus. (N=77)	0%	0%	5.2%	6.5%	32.5%	40.3%	11.7%	3.9%
Publishers were a good source of information about the new syllabus. (N=78)	0%	3.8%	6.4%	12.8%	28.2%	32.1%	14.1%	2.6%
Publishers are knowledgeable about the new syllabus. (N=77)	0%	1.3%	5.2%	15.6%	33.7%	28.6%	15.6%	0%
Publishers do NOT understand the aims of the new syllabus. (N=77)	3.9%	16.8%	28.6%	29.9%	10.4%	10.4%	0%	0%

Table 7 Responses to the four statements that asked about publishers' knowledge of the new syllabus

Aggregating the ratings, it was found that 88.4% of teachers agreed with the statement that 'Publishers understand the aims of the new syllabus' – with 3.9% 'agreeing strongly'. With respect to the other statements, 77% agreed with the statement 'Publishers were a good source of information about the new syllabus' – with 2.6% 'agreeing strongly', 77.9% agreed with the statement 'Publishers are knowledgeable about the new syllabus' and 79.2% disagreed with the negatively worded 'Publishers do NOT understand the aims of the new syllabus'.

5.7 Helpfulness of publishers in explaining the new syllabus

Teachers were asked about whether they thought publishers had helped them to understand the new syllabus in four statements on the questionnaire. The teachers responded to these statements in the following way.

Statements	Disagree strongly	Disagree quite a lot	Disagree moderately	Disagree slightly	Agree slightly	Agree Moderate	Agree quite a lot	Agree Strongly
Publishers helped explain the new syllabus to teachers. (N=77)	0%	2.6%	7.7%	21.8%	30.8%	29.5%	7.7%	0%
Publishers held useful seminars/workshops to explain the new syllabus. (N= 78)	0%	5.1%	5.1%	25.6%	24.4%	29.5%	10.3%	0%
Publishers did NOT help me to understand the new syllabus. (N=77)	2.6%	15.4%	20.5%	23.1%	19.2%	12.8%	6.4%	0%
Publishers helped me to understand the new syllabus. (N=77)	0%	2.6%	6.4%	23.1%	29.5%	28.2%	10.2%	0%

Table 8 Responses to the four statements that asked about the helpfulness of publishers in explaining the new syllabus

Aggregating the ratings, it was found that 68% of teachers agreed with the statement that 'Publishers helped explain the new syllabus to teachers' – with 21.8% 'disagreeing slightly'. With regard to the other statements, 64.2% agreed with the statement 'Publishers held useful seminars/workshops to explain the new syllabus' – with 25.6% 'disagreeing slightly'. 61.6% disagreed with the negatively worded 'Publishers did NOT help me to understand the new syllabus' – with 19.2 'agreeing slightly'. Finally, 67.9% agreed with the statement 'Publishers helped me to understand the new syllabus' – with 23.1% 'disagreeing slightly'.

5.8 The textbook's ability to influence teachers' perceptions of a new syllabus

Although parts of the third section of the questionnaire have been 'cannibalised' above, as explained at the beginning of the chapter, the main aim of this part of the questionnaire was to provide data to answer the research question 'Can publishers

(through the publishing of textbooks) influence teachers' perceptions of a new syllabus and in doing so help to promote curriculum change?'.

5.8.1 Internal consistency

As described in Chapter 4, the 36 statements in this part of the questionnaire were 'constructed' by the researcher around nine scales – nine areas in which it was thought interesting to look for differences between *English Treasure* and *Longman Target English* users. Having completed the first three steps in developing a summated rating scale, i.e. defining the construct, designing the scales, piloting the test (all described in Chapter 4), the next step is to subject collected data to item analysis. The purpose of item analysis being to find those items that form an internally consistent scale and to eliminate those that do not.

Internal consistency[22] was measured in this study using coefficient alpha (or Cronbach's alpha). This value is a direct function of both the number of items in the scale and their magnitude. Coefficient alpha can be raised by increasing the number of items or by raising their intercorrelation. The values of coefficient alpha fall between 0 and 1.0 and are usually positive. (A negative coefficient alpha is found if the items correlate negatively with each other; hence in this study it was necessary to reverse score statements 11, 12, 18, 19, 23, 25, 29, 31 and 35, which were negatively worded.) Larger values of alpha indicate higher levels of internal consistency and a widely accepted 'rule of thumb' is that alpha should be at least .70 for a scale to demonstrate internal consistency (Nunnally 1978).

Caution must be exercised though. As pointed out by Spector (1992, p. 31), 'even items with very low intercorrelations can produce a relatively high coefficient alpha, if there are enough of them'. Spector also warns that a group of items may produce an internally consistent scale but that this does not guarantee that the items reflect a single underlying construct. For example, if we were to take two scales that measure correlated but distinct constructs, a combination of these items in these two scales may yield internal consistency even though they actually represent two different constructs. The conclusion

must be that looking at statistics alone is not always sufficient. Item content is equally important and must also be looked at when drawing conclusions about what is being measured. Finally, although coefficient alpha reflects internal-consistency reliability, it does not reflect reliability over time. This is a particularly important consideration for scales that measure constructs such as mood and attitudes as they are likely to fluctuate over time.

The reliabilities for the nine scales in this study are summarised below, indicating, if necessary, which items had to be deleted in order to increase the internal consistency to an alpha of .70. Full details are provided in Appendix 5.

Scales	Cronbach's alpha
Scales about the new syllabus	
The new syllabus is relevant to students' lives.	.7633 (internally consistent)
The new syllabus is contextualised.	< .7 (cannot achieve internal consistency)
The new syllabus has clear learning targets.	.7021 (internally consistent)
The new syllabus encourages experiential learning.	.7192 (internally consistent if drop item 35)
The new syllabus is task based.	< .7 (cannot achieve internal consistency)
Scales about the respondents' textbook	
My textbook is written in line with the new CDC syllabus.	.8131 (internally consistent)
My textbook has helped me to implement the new syllabus.	.8367 (internally consistent if drop item 11)
Scales about publishers	
Publishers have helped me to understand the new syllabus.	.71 (internally consistent if drop item 19)
Publishers are knowledgeable about the new syllabus.	.7006 (internally consistent if drop item 31)

Table 9 Reliabilities for each scale

The results show that three out of the nine scales have internal consistency. A further four can achieve internal consistency if items are deleted (see above and Appendix 5 for details). Two of the scales 'The new syllabus is contextualised' and 'The new syllabus is task based' have low internal consistencies (Cronbach's alpha < .70) and cannot be 'rescued' by deleting items. These two scales therefore cannot form part of any cross-

group comparison although the eight statements that comprise them can be compared individually. This will be looked at later in this chapter.

5.8.2   Validity

The final step described by Spector (1992, p. 46) in developing a summated rating scale is to validate the scale. As pointed out by Spector [ibid], 'The most difficult part of scale development is validation – that is, interpreting what the scale scores represent'. As at least seven of the scales in this questionnaire have internal consistency, they measure something, but what? We cannot expect a clear-cut answer because, as Spector points out [ibid], 'How can there be a valid measure of a construct when the construct itself cannot directly be validated?'.

If validation cannot actually be proven, then the best that can be done is for evidence to be collected that either supports or refutes validity. There are a number of ways in which this can be done. One common way employed by researchers is to use factor analysis to verify that the items empirically form the intended subscales. As explained by Cherry (1999, p. 267), 'Factor analysis can be used to explore and detect patterns in large data sets … It has the capability to organise a larger number of variables in a study into a smaller set of components (factors) made up of sets of related variables'.

Not all data meets the mathematical assumptions necessary to perform factor analysis so prior to the analysis, it is important to determine the factorability of the data (Cherry 1999). This can be done by calculating Bartlett's Test of Sphericity and Kaiser-Meyer-Olkin (KMO) Measure of Sampling Adequacy.

Kaiser-Meyer-Olkin Measure of Sampling Adequacy		.759
Bartlett's Test of Sphericity	Approx. Chi-Square	1770.579
	Df	630
	Sig.	.000

Table 10 Results of Bartlett's Test of Sphericity and Kaiser-Meyer-Olkin Measure of Sampling Adequacy

91

The null hypothesis of the Bartlett's Test of Sphericity is that the variables are independent of each other. The value above shows that the null hypothesis must be rejected and it must be accepted that the variables are associated in some way.

The Kaiser-Meyer-Olkin (KMO) Measure of Sampling Adequacy gives an indication of the degree of common variance among the variables. The KMO value ranges from 0 to 1. The value of .759 is 'middling' and indicates that if a factor analysis is conducted, the factors extracted will account for a fair amount of variance (Cherry 1999).

Since the results of these two tests are satisfactory, it is possible to proceed to the next step, which is to calculate the communalities.

Statements	Initial	Extraction
1	1.000	.703
2	1.000	.547
3	1.000	.743
4	1.000	.716
5	1.000	.640
6	1.000	.710
7	1.000	.734
8	1.000	.735
9	1.000	.776
10	1.000	.715
13	1.000	.768
14	1.000	.727
15	1.000	.765
16	1.000	.622
17	1.000	.711
20	1.000	.680
21	1.000	.761
22	1.000	.687
24	1.000	.689
26	1.000	.800
27	1.000	.661

28	1.000	.707
30	1.000	.692
32	1.000	.777
33	1.000	.801
34	1.000	.862
36	1.000	.645
X11	1.000	.688
X12	1.000	.543
X18	1.000	.726
X19	1.000	.676
X23	1.000	.720
X25	1.000	.701
X29	1.000	.678
X31	1.000	.744
X35	1.000	.581

Table 11 The communalities, where 'X' indicates a negatively worded statement

The communalities above measure the percent of variance in a given item of the questionnaire.

In the initial solution of principal components analysis, each item is standardised to have a mean of 0.0 and a standard deviation of ±1.0. For this study, this means that the variance of each item = 1.0 and the total variance to be explained = 36. Since a single item can account for 1.0 unit of variance, a 'useful' component must account for more than 1.0 unit of variance, or in other words have an eigenvalue of greater than 1.0. If this were not so, the extracted component explains no more variance than a single item.

The table on the next page shows the eigenvalues for seven components (the full set of data is given in Appendix 6). As outlined above, if a component has a low eigenvalue, then it is contributing little to the explanation of the variance and may be ignored as redundant. There are differences of opinion about where the cut-off point should be. One method (Cherry 1999) is to only select eigenvalues of greater than 1.0 (which is what is shown in Table 12).

Com-ponent	Initial Eigenvalues			Extraction Sums of Squared Loadings			Rotation Sums of Squared Loadings		
	Total	% of Variance	Cumulative %	Total	% of Variance	Cumulative %	Total	% of Variance	Cumulative %
1	11.702	32.506	32.506	11.702	32.506	32.506	5.886	16.351	16.351
2	4.762	13.227	45.733	4.762	13.227	45.733	4.789	13.303	29.654
3	3.152	8.755	54.488	3.152	8.755	54.488	4.746	13.182	42.836
4	1.880	5.223	59.711	1.880	5.223	59.711	3.393	9.426	52.263
5	1.497	4.158	63.869	1.497	4.158	63.869	2.645	7.346	59.609
6	1.279	3.553	67.422	1.279	3.553	67.422	2.577	7.159	66.767
7	1.160	3.223	70.645	1.160	3.223	70.645	1.396	3.878	70.645

Table 12 Components with eigenvalues greater than 1.0 – initial values and rotated (with Varimax rotation) values

Note that these seven components can together explain 70.645% of the variance. There are other ways to determine the 'cut-off point'. One other popular method is to use the Cattell scree test, which plots the components on the x-axis and the corresponding eigenvalues on the y-axis (see below).
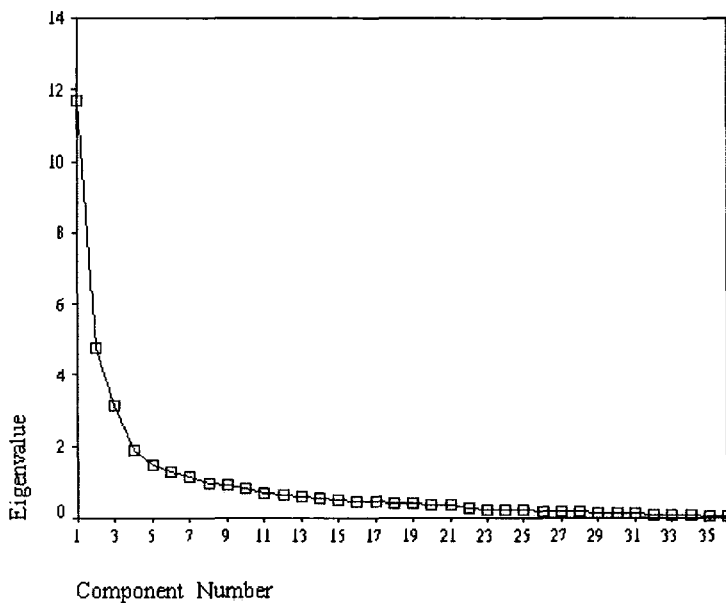
Figure 7 The Cattell scree test

The eigenvalues are arranged in descending order of magnitude so as one moves to the right, an elbow shape is created as the curve becomes less steeply inclined. The Cattell's scree test says to drop all further components after the one starting 'the elbow'. Of course, where the elbow starts exactly is somewhat subjective, but in this case one would probably decide that only the first four factors were worth retaining in the analysis.

Before making a final decision on the 'cut-off point', it is wise to look at the central output. The central output for any factor analysis is the rotated component matrix. It shows the factor loadings and provides a basis for putting a label to the different factors. As pointed out by Spector (1992, p. 55), 'It is hoped that each variable will have a large loading on one and only one factor. A variable is said to "load" on that factor for which it has a high loading'. Spector comments [ibid] that 'a minimum value of about .30 to .35 is required to consider that an item loads on any factor'. Since factor loadings are the correlation coefficients between the variables and the factors, higher loadings provide a stronger basis for 'putting a label to the different factors'. The loadings for the seven components identified earlier are given below.

	Component						
	1	2	3	4	5	6	7
1	.771	.281	.002	.121	.115	.028	-.022
2	.545	.233	.054	-.157	-.126	.158	.356
3	.708	.227	.118	-.204	.349	.114	-.031
4	.375	.723	-.045	.105	.110	-.114	.122
5	.723	.175	.159	.058	.144	.163	.101
6	.411	.487	.131	.028	.515	.130	.058
7	.224	.308	-.043	.441	.595	.131	-.148
8	.517	.166	.013	.033	.552	.294	-.220
9	.167	.755	.080	.094	.398	-.011	.071
10	.778	.234	.135	.060	-.122	.128	-.029
13	.194	.784	.173	.113	.204	.127	.122
14	.085	.216	.012	.208	.733	.075	.296
15	.411	.174	.055	.148	.241	.241	.652

16	.551	.129	.082	.131	.365	.147	.350
17	.488	.193	-.083	.029	.366	.542	-.018
20	.241	.724	.052	.248	-.016	.178	.019
21	.248	.233	.153	.009	.156	.765	-.109
22	.497	.125	.002	.053	.143	.596	.216
24	.218	.008	-.141	.138	-.030	.750	.199
26	.125	.219	-.079	.849	.052	-.073	-.037
27	.009	.359	.110	.648	.290	.121	.035
28	.457	.045	.183	.594	.022	.263	.202
30	.661	.193	.187	.210	.136	.284	.200
32	.706	.075	.103	.359	.160	.319	-.082
33	.194	.743	.059	.402	.056	.184	-.097
34	.234	.765	-.026	.424	.082	.180	-.044
36	.049	.373	-.068	.685	.052	.163	.004
X11	-.230	.021	.738	-.051	-.239	.131	.114
X12	.070	-.106	.683	-.115	-.141	.058	.155
X18	.351	-.004	.763	-.058	-.133	.009	.003
X19	.025	.035	.739	.078	.271	.032	-.219
X23	-.032	.405	.722	-.073	.072	-.011	.150
X25	.202	.010	.782	.155	.023	-.082	.133
X29	.152	.173	.626	-.275	.212	.006	-.335
X31	.119	.108	.798	.077	.205	-.132	-.126
X35	.159	-.100	.398	-.544	-.099	.144	-.244

Table 13 Component matrix – rotated with Varimax rotation, where 'X' indicates a negatively worded statement

If one 'cleans up' the data by deleting all the values less than .6 (both positive and negative numbers), the data above can be rearranged to show the highest loading for each component and how many items load on each component. This allows us to attempt to name a factor. It also allows us to see whether any items are loaded on more than one component.

	Component							Scale	Dimension
	1	2	3	4	5	6	7		
30	.661							5	Syllabus
32	.706							1	Syllabus
3	.708							5	Syllabus
5	.723							1	Syllabus
1	.771							1	Syllabus
10	.778							2	Syllabus
4		.723						7	Textbook
20		.724						7	Textbook
33		.743						6	Textbook
9		.755						6	Textbook
34		.765						7	Textbook
13		.784						6	Textbook
X29			.626					3	Syllabus
X12			.683					5	Syllabus
X23			.722					6	Textbook
X11			.738					7	Textbook
X19			.739					8	Publisher
X18			.763					1	Syllabus
X25			.782					2	Syllabus
X31			.798					9	Publisher
26				.849				9	Publisher
27				.648				9	Publisher
36				.685				8	Publisher
14					.733			8	Publisher
21						.765		3	Syllabus
24						.75		5	Syllabus
15							.652	4	Syllabus
X35								4	Syllabus
6								9	Publisher
28								2	Syllabus
17								3	Syllabus
22								4	Syllabus

8								3	Syllabus
2								4	Syllabus
16								2	Syllabus
7								8	Publisher

Table 14 Component matrix with all values < .6 deleted and items rearranged, where 'X' indicates a negatively worded statement

Looking at the 'cleaned up' component matrix, one can see that the first component (which explains 32.506% of the variance) has high loadings from scales 1 and 5 (both scales relating to the new syllabus). The second component (which explains 13.227% of the variance) has high loadings from scales 6 and 7 (both scales relating to textbooks). The third component (which explains 8.755% of the variance) has high loadings from what must be concluded is an 'artificial variable' – negative wording – as can be seen by the fact that all the statements are 'X', i.e. reversed items. The fourth component (which explains 5.223% of the variance) has high loadings from scales 8 and 9 (both scales relating to publishers). The fifth, sixth and seventh components are based on one, two and one items, respectively, which would suggest that the Cattell screen test 'recommendation' of selecting the first four as factors would appear to be the best.

These initial findings illustrate one of the weaknesses of factor analysis – the statistical procedure will generate factors whether they make sense or not. It is true that the items in the third factor had something in common – they were all negatively worded – but this is not what was being looked for. It was therefore decided to rerun the factor analysis without any of the negatively worded items to determine to what extent their deletion would affect the factorial structure. The finding illustrate another weakness – a weakness in the design of the questionnaire. Unfortunately, the fact that some respondents struggled with the negative wording[23] was not picked up in the piloting of the questionnaire.

First Bartlett's Test of Sphericity and Kaiser-Meyer-Olkin (KMO) Measure of Sampling Adequacy were recalculated and found to be acceptable (see Table 15). Then the communalities were calculated (see Table 16).

Kaiser-Meyer-Olkin Measure of Sampling Adequacy		.853
Bartlett's Test of Sphericity	Approx. Chi-Square	1290.821
	Df	351
	Sig.	.000

Table 15 Results of Bartlett's Test of Sphericity and Kaiser-Meyer-Olkin Measure of Sampling Adequacy (data minus the negatively worded items)

Statements	Initial	Extraction
1	1.000	.667
2	1.000	.622
3	1.000	.745
4	1.000	.692
5	1.000	.662
6	1.000	.709
7	1.000	.760
8	1.000	.716
9	1.000	.795
10	1.000	.744
13	1.000	.756
14	1.000	.739
15	1.000	.783
16	1.000	.678
17	1.000	.696
20	1.000	.691
21	1.000	.756
22	1.000	.687
24	1.000	.705
26	1.000	.825
27	1.000	.642
28	1.000	.708
30	1.000	.694
32	1.000	.797
33	1.000	.798
34	1.000	.853
36	1.000	.678

Table 16 The communalities (data minus the negatively worded items)

Once the eigenvalues are calculated, it is found that six components (the full set of data is given in Appendix 7) have eigenvalues of greater than 1.0 (see below).

Com-ponent	Initial Eigenvalues			Extraction Sums of Squared Loadings			Rotation Sums of Squared Loadings		
	Total	% of Variance	Cumulative %	Total	% of Variance	Cumulative %	Total	% of Variance	Cumulative %
1	11.157	41.323	41.323	11.157	41.323	41.323	4.777	17.693	17.693
2	2.994	11.090	52.413	2.994	11.090	52.413	4.639	17.180	34.873
3	1.810	6.704	59.118	1.810	6.704	59.118	3.113	11.530	46.403
4	1.372	5.082	64.200	1.372	5.082	64.200	2.661	9.855	56.258
5	1.208	4.474	68.674	1.208	4.474	68.674	2.398	8.880	65.137
6	1.056	3.912	72.586	1.056	3.912	72.586	2.011	7.449	72.586

Table 17 Factors with eigenvalues greater than 1.0 – initial values and rotated (with Varimax rotation) values (data minus the negatively worded items)

Looking at the Cattell scree test, it would appear that the 'cut-off point' should be at three components.
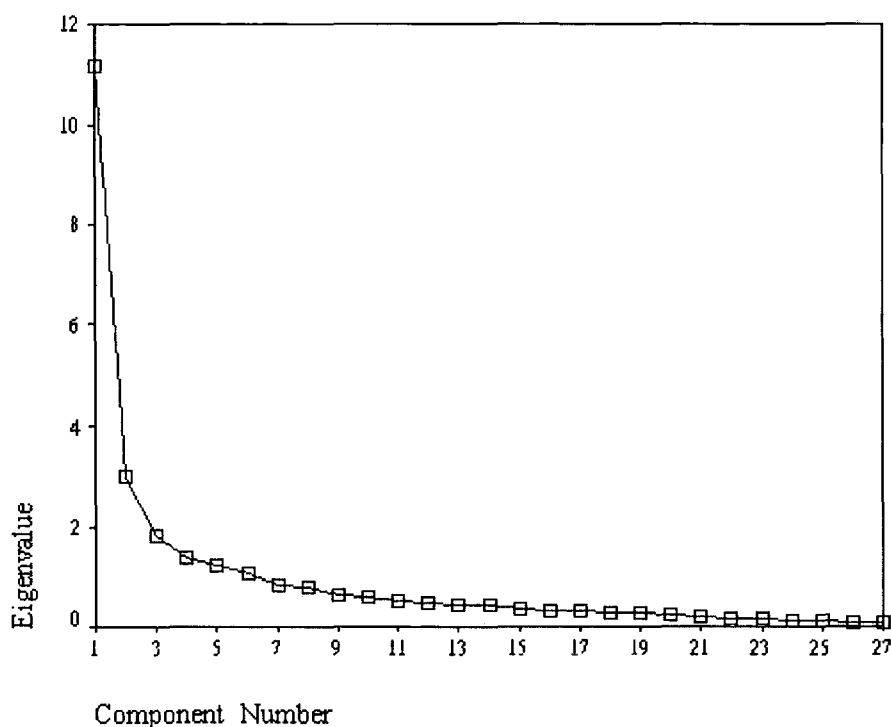
Figure 8 The Cattell scree test (data minus the negatively worded items)

100

This is confirmed by looking at the component matrix rotated with Varimax rotation and at the 'cleaned up' component matrix where all values < .6 are deleted and then the items rearranged (see Tables 18 and 19).

	Component					
	1	2	3	4	5	6
1	.702	.285	.145	.041	.141	.224
2	.363	.246	-.136	.178	-.147	.598
3	.693	.214	-.189	.152	.374	.142
4	.347	.726	.072	-.075	.105	.151
5	.719	.191	.049	.182	.118	.243
6	.374	.504	-.004	.170	.498	.195
7	.209	.314	.411	.168	.637	-.118
8	.516	.210	-.014	.360	.521	-.067
9	.156	.777	.039	.022	.396	.084
10	.789	.257	.048	.161	-.126	.110
13	.155	.774	.143	.084	.207	.250
14	.027	.146	.265	.036	.754	.277
15	.226	.149	.188	.220	.228	.758
16	.422	.121	.169	.133	.347	.565
17	.431	.197	.029	.580	.343	.131
20	.215	.737	.235	.206	-.016	.061
21	.255	.270	-.027	.776	.124	-.017
22	.437	.102	.062	.623	.155	.266
24	.086	-.042	.223	.747	-.041	.294
26	.081	.161	.878	-.110	.103	.004
27	-.021	.359	.640	.104	.297	.069
28	.446	.013	.633	.215	.027	.248
30	.609	.224	.204	.284	.090	.377
32	.734	.109	.332	.331	.160	.032
33	.164	.747	.418	.184	.057	.028
34	.212	.764	.423	.191	.093	.019
36	-.023	.371	.712	.153	.076	.061

Table 18 Component matrix – rotated with Varimax rotation (data minus the negatively worded items)

101

	Component						Scale	Dimension
	1	2	3	4	5	6		
10	.789						2	Syllabus
32	.734						1	Syllabus
5	.719						1	Syllabus
1	.702						1	Syllabus
3	.693						5	Syllabus
30	.609						5	Syllabus
9		.777					6	Textbook
13		.774					6	Textbook
34		.764					7	Textbook
33		.747					6	Textbook
20		.737					7	Textbook
4		.726					7	Textbook
26			.878				9	Publisher
36			.712				8	Publisher
27			.640				9	Publisher
28			.633				2	Syllabus
21				.776			3	Syllabus
24				.747			5	Syllabus
22				.623			4	Syllabus
14					.754		8	Publisher
7					.637		8	Publisher
15						.758	4	Syllabus
2							4	Syllabus
6							9	Publisher
8							3	Syllabus
16							2	Syllabus
17							3	Syllabus

Table 19 Component matrix with all values < .6 deleted and items rearranged (data minus the negatively worded items)

The results show that no items are loaded on more than one component. Using Cattell's scree test also allows us to identify three factors. The first factor (which explains 41.323% of the variance) has high loadings from the scales relating to the new syllabus. The second factor (which explains 11.090% of the variance) has high loadings from the scales relating to textbooks. The third factor (which explains 6.704% of the variance) has high loadings from the scales relating to publishers.

It would probably be unwise to fall into the trap of reading too much into this data given the small sample size, which should ideally be above 100 rather than the 78 obtained in this study (Spector 1992). However, the identification of three factors – one based around the new syllabus, one based around textbooks and one based around publishers – provides some evidence to suggest that there is some basis to the hypothesised factor structure. Further and larger studies would be needed to see if it is possible to 'dissect' these three factors into the nine scales suggested in the questionnaire.

In conclusion, the results of the factor analysis although encouraging are not conclusive. In view of the small sample size, it was therefore decided to 'stick with' the original scales (minus the two that showed poor internal consistencies) for the comparison between *English Treasure* and *Longman Target English*.

5.8.3 Cross-group comparison of means

Having determined which scales are internally consistent, it is now necessary to attempt to compare the responses of teachers using *English Treasure* with those of the teachers using *Longman Target English* to determine if there are any differences. One way of doing this is to obtain the means for the two groups (for each scale) and determine whether the differences between them are 'real' differences or the result of sampling error.

To compare the scores of the two groups of different subjects on one variable, it is necessary to use the between subjects (independent) t-test. The t-test allows us to test the null hypothesis that there are no differences between *Oxford Treasure* users' perceptions

103

and *Longman Target English* users' perceptions. In order to conduct a t-test, the data must meet two criteria (Cherry 1999): it must be collected from groups that are representative of the population from which the data is drawn; and the population must be normally distributed.

Since schools were selected at random from a group of schools using two of the three most popular textbooks in Hong Kong, it is hoped that the subjects are representative of the population from which they are drawn. However, some caution must be exercised because it is possible to argue that they are only representative of the lower-band school population and not of all schools in Hong Kong.

With regards to the second criterion, of course, as pointed out by Cherry (1999, p. 209), 'We can never know if the population in the sample is normally distributed unless the whole population participates in the study'. This is clearly impossible so one must take Cherry's advice [ibid] and attempt to ensure a normal participation by using a relatively large sample. His suggestion is 100 to 150 participants, which unfortunately this study cannot quite match although the response rate of 76% gives some credibility to the 'normalness' of the sample.

As mentioned earlier, two of the scales (Scale 2 and Scale 5) were found to have poor internal consistency and were deleted. The remaining seven gave the following results[24].

Scale	T1 mean	T2 mean	Mean difference	t	Sig. (2-tailed)	Effect size
Scale 1	21.4103	23.3333	-1.9231	-2.316	0.023	-0.5101
Scale 3	21.0541	22.4872	-1.4331	-1.865	0.066	-0.4211
Scale 4	16.5385	17.4615	-0.9231	-1.633	0.107	-0.3659
Scale 6	21.0769	22.3077	-1.2308	-1.414	0.161	-0.3181
Scale 7	16.2973	16.6154	-0.3181	-0.512	0.61	-0.1180
Scale 8	15.1282	14.9487	-0.0256	-0.031	0.975	-0.0088
Scale 9	15.9744	16.4054	-0.431	-0.666	0.508	-0.1522

Table 20 Summary of the t-test and effect size data for each of the seven internally reliable scales

At the 5% level of significance[25], significant effects of textbook were found in Scale 1 with *Longman Target English* users agreeing more strongly than *Oxford Treasure* users that the new syllabus is relevant to students' lives.

In order to quantify the size of the difference between the groups, effect size was calculated. The effect size of –0.5101 for Scale 1 can be considered as a 'medium' effect (Cohen 1969) and indicates that 69% of the *Oxford Treasure* users would score below the average person in the *Longman Target English* group.

As mentioned earlier in this unit, it is also possible to extract data by comparing not only the scales but also the 36 individual statements. A summary of this data[26] is found below.

Statement	T1 mean	T2 mean	Mean difference	t	Sig. (2-tailed)	Effect size
1	5.4103	5.8974	-0.49	-2.01	0.049	-0.4491
2	5.8974	6.0000	-0.1	-0.417	0.678	-0.0926
3	5.5897	6.0000	-0.41	-1.709	0.092	-0.3820
4	5.5000	5.4872	0.01	0.053	0.958	0.0094
5	5.3333	5.9231	-0.59	-2.19	0.032	-0.4844
6	5.3333	5.8421	-0.51	-2.113	0.038	-0.4721
7	5.0000	5.0000	0	0	1	0
8	5.3590	5.5641	-0.21	-0.795	0.429	-0.1848
9	5.4615	5.6923	-0.23	-0.897	0.372	-0.2028
10	5.6667	6.0769	-0.41	-1.51	0.135	-0.3389
X11	4.4474	4.7179	-0.2706	-0.877	0.383	-0.2003
X12	5.1795	5.7179	-0.5385	-1.767	0.081	-0.3947
13	5.2821	5.7179	-0.44	-1.771	0.081	-0.3993
14	4.9487	5.0256	-0.08	-0.263	0.793	-0.0623
15	5.2308	5.6154	-0.38	-1.719	0.09	-0.3799
16	5.2821	5.9231	-0.64	-2.682	0.009	-0.5834

17	5.2973	5.8462	-0.55	-2.379	0.02	-0.5308
X18	5.0513	5.5641	-0.5128	-1.594	0.115	-0.3573
X19	4.8462	5.0513	-0.2051	-0.587	0.559	-0.1335
20	5.3590	5.5385	-0.18	-0.751	0.455	-0.1710
21	5.5128	5.7692	-0.26	-1.174	0.244	-0.2690
22	5.4103	5.8462	-0.44	-1.825	0.072	-0.4111
X23	4.7949	5.1795	-0.3846	-1.185	0.24	-0.2677
24	5.4872	5.6154	-0.13	-0.496	0.621	-0.1145
X25	5.1538	5.4872	-0.3333	-1.018	0.312	-0.2305
26	5.3846	5.2308	0.15	0.508	0.613	0.1126
27	5.2564	5.3421	-0.09	-0.326	0.746	-0.0784
28	5.6154	5.7632	-0.15	-0.55	0.584	-0.1279
X29	4.9231	5.3077	-0.3846	-1.145	0.256	-0.2589
30	5.7949	6.0526	-0.26	-0.998	0.321	-0.2295
X31	5.2895	5.5641	-0.2746	-0.932	0.354	-0.2125
32	5.6154	5.9487	-0.33	-1.276	0.206	-0.2849
33	5.5385	5.7179	-0.18	-0.699	0.486	-0.1594
34	5.4474	5.5897	-0.14	-0.625	0.534	-0.1407
X35	4.8205	5.346	-0.5641	-1.532	0.13	-0.3439
36	5.1795	4.9231	0.26	0.948	0.346	0.2177

Table 21 Summary of the t-test and effect size data for each statement, where 'X' indicates a negatively worded statement

Significant effects of textbook were found in five of the statements (Statement 1, Statement 5, Statement 6, Statement 16 and Statement 17) with *Longman Target English* users agreeing more strongly than *English Treasure* users that 'The new syllabus is relevant to students' lives', that 'The new syllabus encourages the use of everyday language', that 'Publishers understand the aims of the new syllabus' that 'The new syllabus encourages communication within genuine situations' and that 'With the new syllabus, the learning targets are stated more clearly'.

According to Cohen's guidelines (Cohen 1969), the effect sizes for Scales 1, 5 and 6 would be classified as 'small'. However, a look at percentiles shows that, for each of these scales, 66% of the *Oxford Treasure* users would score below the average person in the *Longman Target English* group. For Scales 16 and 17, which have effect sizes that can be classified as 'medium', this percentile rises to 69%.

The results are interesting. The null hypothesis underpinning this thesis – that choice of textbook does not affect teacher's perceptions and beliefs – must be rejected. The results show that there are significant effects of textbook between the two user groups.

Interestingly, none of these differences relate to perceptions about their textbook, rather they relate to how they feel about the new syllabus and to a lesser extent how they feel about publishers.

The results are important because they indicate that textbooks have the power to affect teacher's perceptions about something as fundamental as the nature of a syllabus. How is this done? And what is it about the two textbooks that make teachers feel this way? These are two fundamental questions that will be discussed further in Chapter 7.

The results also indicate that teachers can perceive differences between the 'abilities' of publishers. That is, they perceive publishers not merely as 'delivers of books' but rather as contributors to the educational process. Clearly there are 'business' implications for publishers. However, there are also 'educational' implications. These will both be discussed in Chapter 7.

CHAPTER 6   DATA ANALYSIS AND RESULTS (INTERVIEWS)

The results of the interviews were analysed as follows. The recordings of the interviews were played and transcripts taken. The recordings were then replayed and the transcripts reread to further check their accuracy. Any common themes were highlighted and information about these different themes copied and pasted into separate files under headings.

6.1   Success of the new syllabus

The first question was deliberately kept vague in order to probe how teachers themselves defined 'success'. Of the 11 teachers interviewed, 8 started by expressing positive sentiments about the new syllabus (1 stated that he did not know what the new syllabus was – asking whether it was their textbook that was being referred to). These positive sentiments were not strongly worded, with most teachers hesitating and then making comments such as 'I think it has been successful to a certain extent'. Others said that they thought it had been 'marginally successful' and 'moderately successful'. Upon further probing, it was found that 'success' was defined in several ways. For some it clearly meant that they thought a change had been implemented smoothly. For others, success was defined in terms of effects upon teaching and learning.

Two of the teachers stated that they didn't actually know whether the syllabus had been successful or not. When asked about this further, they commented that they could see that the standard of students was declining but they weren't sure what the cause was. Both these teachers had been teaching for over 15 years and pointed out that they had seen declining standards for many years now and that the policy[27] of moving from EMI to CMI had definitely led to a further drop in standards and interest in English. They both pointed to the difficulty of measuring the effects of such things as a new syllabus when so many aspects of education in Hong Kong were changing at the same time. The change in medium of instruction was pinpointed as one by these two teachers. The push to include more IT in teaching was another.

None of the teachers took this question as an opportunity to enthuse about the new syllabus and most took the opportunity instead to reflect on aspects that they thought were not working well before being prompted to reflect on aspects that they thought were working well.

The most frequent complaint about the new syllabus mentioned by teachers in the interviews related to doubts about whether task-based teaching was suitable for lower-band students. This comment was made by 8 of the 11 teachers interviewed. 'In some of the lower-band schools like our school it's impossible – that's why we cannot achieve the aims of task-based' [sic]. Six teachers (all panel chairs) said that they did not believe that their students had reached the threshold necessary to benefit from task-based teaching and learning when they entered the school at Form 1. A poor grasp of grammar and a lack of vocabulary were frequently cited as weaknesses. Blame was often placed on the primary schools, with one teacher saying 'They have not learnt what they should learn in the primary schools.'

Another frequent comment that came up in the interviews related to the time and what some teachers referred to as the 'efficiency' of the new syllabus. Four of the teachers (all panel chairs) commented that they thought that task-based teaching took up more time. When probed further about this, common examples given related to the teaching of grammar and to the teaching of writing. Several teachers lamented that the 'old' way of teaching grammar – through rote learning and mechanical practice – produced results faster. Several teachers were also concerned that through spending more time on themes students were exposed to a narrower range of vocabulary and that they produced fewer pieces of writing compared with the past. These same teachers were, however, quick to point out that, despite this, they were still satisfied because they felt their students' writing was of a better quality and that the students had been more interested in the lessons.

The final comment that was frequently made by teachers related to grammar. Eight of the teachers mentioned grammar as an area of concern about the new syllabus. One

teacher said 'We can see that it is a major weakness of task-based learning – we need to strengthen the grammar bit'. It was clearly perceived by teachers that grammar did not play a central enough role in the new syllabus and that this might affect the students' performance later in the public exams. All of the eight teachers who mentioned this as a problem said that they were providing their students with extra grammar work – 'extra' meaning over and above that supplied in their chosen textbook. Some were using supplementary grammar books. Others were devising their own materials.

Although quick to mention the ways in which they thought the new syllabus was lacking, all 10 teachers who knew about the syllabus were also able to point out ways in which they thought the new syllabus was better than the old. For example, 5 teachers commented that they felt they were teaching in a less fragmented way and 4 commented that they perceived that their students' productive skills (speaking and writing) had improved. Although many of the teachers said that they didn't think the syllabus was that suitable for lower-band students, the same teachers pointed out that for the stronger students the new syllabus gave them greater freedom to express themselves.

Not surprisingly, another frequently referred to definition of success concerned the students' learning. All 10 teachers who knew about the syllabus commented that the students found the new syllabus more interesting and more relevant to their lives. One teacher said 'Students are more motivated. They enjoy the activity of the tasks.' Three teachers also pointed out that they believed that the new syllabus encouraged 'generic learning skills, which could be applied to other subjects too'. In particular, they mentioned creativity, originality and cooperation. They expressed satisfaction that learning English in this way could help students with other parts of the curriculum.

Throughout these interviews it was interesting to observe that frequently when teachers spoke about the new syllabus, they were in fact referring to specific materials in their textbook. For example, all of the teachers said that the new syllabus had interesting themes and then gave examples taken from the textbook they were using. Of course, none of these themes used in textbooks had actually been specified in the new syllabus

and therefore what they were talking about was actually the choice of publishers' writing and editorial teams not the new syllabus itself.

Another frequently cited 'improvement' attributed to the new syllabus was the greater use of IT. Five teachers said that they considered the greater use of IT in teaching to be a good thing about the new syllabus. Again this is interesting, because the push to encourage more use of IT in education was actually a separate initiative first announced in Chief Executive Tung Chee Hwa's inaugural policy address (Education and Manpower Bureau 1998). That in teachers' minds the two were linked is not surprising though since the two initiatives were being implemented at the same time. Also, it was frequently commented by teachers that they chose textbooks not only based on the attributes of the textbook in question but also on the supporting materials provided by the publishers, which at the time of the new textbooks being introduced largely included IT teaching resource materials.

When asked how much their teaching had changed since the introduction of the new syllabus, most of the teachers interviewed concluded that little had changed in terms of how they taught. A common way to express this was that most things remained the same although some new 'elements' had been introduced. When probed as to what these 'elements' were, teachers often explained that they had added some tasks to their teaching. Sometimes, the addition of projects was mentioned. The central impression was not that their whole way of teaching had been overhauled to make it task-based or task-centred – more their teaching had been modified to make it 'task-tacked on'.

6.2   Familiarity with the aims of the new syllabus

Of the 11 teachers interviewed, 10 said that they felt quite familiar with the aims of the new syllabus (1 teacher as previously mentioned had no knowledge of the new syllabus despite being a teacher for over 8 years). Generally speaking, the panel chairs expressed more confidence than the 2 'regular' teachers and the 2 NETs. This is not surprising and it was evident that the panel chairs were more highly trained – all having attended at least 1 or more training sessions and 5 having recently completed M Eds, which they said had included quite a

lot about task-based teaching and learning. Four of the panel chairs interviewed also expressed doubt that their colleagues were familiar with the aims of the new syllabus. 'Many teachers have the wrong concept [about the new syllabus],' said one. One of the NETs interviewed also pointed out that in his opinion, the extent to which teachers were familiar with and 'bought into' the new syllabus varied widely (at least within his school). 'Some teachers are taking the ball and running with it – other are like "Here we go again – another new fad" ... and are less enthusiastic,' he said.

6.3   Implementation of the new syllabus

When asked why they thought a new syllabus had been introduced, all the teachers were initially stuck for an answer. None pointed out the presence of the TOC syllabus in primary schools. None in fact appeared to consider that it was something they should know nor were in fact troubled that they didn't know. After some thought, 4 expressed opinions along the lines of making the syllabus more relevant to society but none of them were confident about this and asked the interviewer if this was the 'correct' answer.

When asked how they had found out about the new syllabus, all the teachers who knew about the new syllabus said that they had attended seminars and workshops run by the EMB and had read documents about the new syllabus. All had attended seminars and workshops before the implementation of the new syllabus and 7 (all panel chairs) had attended them since. Nine of them pointed out that they thought they had learnt more about the syllabus since having to teach it.

When asked about the usefulness of the training given, all rated it quite positively. Although there were frequent complaints about having to do homework and assignments, those who had done them as part of their training commented that it had helped them to understand the aims of the new syllabus better. As pointed out by one teacher who had never had to design her own materials for the new syllabus, 'because we do not need to design our materials ... if we need to do it, we would pay more attention to what a task means' [sic].

One of the NETs interviewed (who came from the UK) said that he found the hierarchical system in Hong Kong difficult to cope with and said that there was a problem passing on information within his school. 'Things reach us externally but they are not passed on internally to teachers – they just go to panel chairs'. He commented that although members of the panel (and frequently the panel chair) went to seminars and workshops, there were rarely if ever feedback sessions with the members of the panel who did not attend and therefore information was not disseminated among the 'ordinary teachers' as quickly as it could be.

None of the teachers cited seminars held by publishers as being a primary source of information about the new syllabus, although 9 of the teachers had attended seminars organised by publishers. They commented that although these seminars had been interesting, they had mainly provided them with information about the books rather than information about the new syllabus.

6.4 Knowledge of the textbook review process

Eight of the teachers interviewed were familiar with the textbook review process. When asked about the purpose of the procedure, most readily explained that the purpose was to ensure that the books followed the current CDC syllabus. One of the teachers had recently served as a reviewer for the textbook review committee and therefore was very familiar with the aims of the process. All eight teachers agreed that the process was important and that it gave them confidence in a textbook. 'I feel confident that an approved book will meet my needs,' said one teacher. 'These are qualified books,' said another. The 8 teachers all agreed that if a textbook had been passed by the textbook review committee, it demonstrated that the book fulfilled the needs of the current syllabus.

6.5 Choice of textbook and beliefs about publishers in Hong Kong

When asked whether their choice of textbook had helped them implement the new syllabus, all 11 teachers agreed it had (including the one who professed to know nothing about the syllabus). One of the teachers expressed some doubt about her choice of textbook (*English Treasure*) though and said 'In fact, not many teachers in our school know something about the task-based and that's why we use a so called task-based coursebook but in fact they just use the traditional

method. And also because maybe the textbook we chose does not provide an obvious picture ... that is a clear picture for the teachers to know what task-based refers to' [sic].

When asked about how they had chosen their book, it was evident that the lower-band schools in particular had chosen a book based on the ability of their students and what they thought students would be interested in. As one teacher commented, 'Right now I can see that all the publishers claim that they have covered the task-based syllabus but in fact we chose a book based on the needs of our students – their [the books'] level of difficulty. Themes are also important'.

Another clear factor in the choice of book (pointed out by 7 of the teachers) was the supporting materials available provided free to teachers. 'When we choose a book, of course we look at the themes and the level of difficulty but we also look at the supporting materials,' said one teacher. 'At that time, the level of IT support was important to us,' said another teacher.

It was interesting to see that although all the teachers agreed that their choice of textbook had helped them to implement the new syllabus, none of the teachers interviewed said that they had chosen a book based on this criterion. Other criteria seemed to have been much more important. It must be remembered that the schools involved in this study fall within the bottom half of schools in Hong Kong and it would be interesting to see if this sentiment was mirrored in higher-band schools.

When asked how they felt about publishers, all the 11 teachers responded positively. All the teachers appeared to perceive that publishers were very important to them. Seven of the teachers appeared particularly enthusiastic about publishers. One said 'I think they are our partners – without them we cannot have a successful lesson. Publishers can provide us with a lot of assistance'. Another said 'I think they are doing a lot – I really do believe that they are trying to help. A lot of those publishers are really enthusiastic people. Sometimes I do want to write something but I find it really really difficult – the ideas and the research. I think they're great'. All these 7 teachers said that they believed that publishers were doing more than ever before.

Six of the teachers expressed positive sentiments but moved on to talk about how the dominant role of publishers could cause difficulties. One of the NETs (who came from New Zealand) said 'I'm of the opinion that the EMB leaves a lot up to publishing companies to fill in the gaps – because they know they will'. The same teacher, talking about the EMB's role in implementing the new syllabus and in particular talking about the lack of teaching materials provided, then went on to say 'They wouldn't have got away with that in New Zealand – if that was all they were offering to teachers ... there's no way that would have been adequate enough' [sic]. She then went on to conclude that 'I almost feel that the publishers dictate quite a lot of what is going on'.

Another teacher pointed out the problem of teachers becoming too reliant on publishers and said 'Well, they've done a good job. In fact, now they provide lots of course materials ... well, compared with one or two years ago, which is really important. But, at the same time, we know that we, the teachers, will not try to write our own materials, which is not good. There are two sides to the coin'.

One of the teachers said he felt that that often publishers did not take enough risks. He said he felt that the task-based books produced by publishers for the new syllabus had not gone far enough. However, having said that, he admitted that the books as they were appealed to the teachers in his panel and also admitted that he understood that publishers had to make money and therefore wanted to produce a popular book rather than a ground-breaking book.

Although 2 of the teachers said that they had discussed using school-based material in their school, they said the idea had been dismissed because 'the teachers don't want to be bothered with designing a whole course for the school and they are not confident in doing so either'. Another teacher said that the idea was 'pie in the sky'. She then went on to explain that the volume of marking left teachers with far too little time to write materials, that they were not confident enough to write their own material and that if they ever did write materials, it was always a copy of what was in textbooks so what was the point.

The extent to which these results echoed those found in the questionnaires and in the literature is discussed in Chapter 7.

CHAPTER 7   DISCUSSION AND CONCLUSION

Although the results of this study have been reported in Chapters 5 and 6, it is necessary to discuss the extent to which they support and corroborate each other. It is also necessary to revisit the initial research questions, in particular in relation to the literature review presented in Chapters 2 and 3 to reflect upon what has been shown in this study.

7.1   Familiarity with the aims of the new syllabus

It was found that in both the questionnaires and the interviews, teachers reported that they felt quite confident that they were familiar with the aims of the new syllabus. The majority (59%) of teachers who filled in the questionnaire ticked 'quite confident' that they were familiar with the aims of the new syllabus and 10 of the 11 teachers in the interviews expressed similar confidence. However, upon further probing, the responses of the teachers in the interviews showed what could be described as rather a surface understanding of the aims of the new syllabus, with only 2 of the 11 (in this researcher's opinion) being able to articulate clearly what task-based learning was. It was also frequently commented by the panel chairs in interviews that although they thought they were familiar with the aims of the new syllabus, they doubted whether many other members of the panel were. This suggests that the number of teachers (35%) who felt 'not at all confident' may in fact actually be higher.

This finding is in common with the conclusions of Wong and Pang (2000), who in their study of primary English teachers found that many teachers did not understand the nature of the innovation. Wong and Pang's study also found that although teachers often professed to understand the new syllabus, for example, claimed to be doing tasks in their English lessons, they were in fact, in the opinions of the researchers, just doing exercises and activities. It would suggest that like primary English teachers, secondary English teachers also found the new TOC syllabus difficult to comprehend fully.

The relatively small number of teachers (6%) who felt 'very confident' is also a source of concern. While one may not expect a large number of teachers to be able to express such

confidence, one would hope that on average one teacher per school for these junior forms should be able to do so. It raises the issue of whether there should be a 'threshold level' of confidence before a new syllabus is implemented in order to give a new syllabus the impetus it needs to survive within the school situation. It also raises the question of whether it would be advisable for one or more teachers in a panel to be given the role of being 'an expert in a new syllabus'. Although it was observed that at the time of the implementation (in 2001), a number of schools gave one or more teachers the role of being 'TOC coordinator', this role seems to have been dropped in the years since the implementation of the syllabus. This would suggest that the role of this position was more to do with 'coping' rather than affecting and helping to implement permanent change.

7.2   Success of the new syllabus

The questionnaire attempted to gauge the extent to which teachers were satisfied that the new syllabus had been implemented well by asking whether they thought the implementation of the new syllabus had been 'very successful', 'quite successful' or 'not at all successful'. This question was followed up in the interviews as an attempt to qualify more precisely what 'successful' meant in this context.

The majority of teachers (74%) who filled in the questionnaire answered that they thought that the implementation of the syllabus had been 'quite successful'. It was telling that none of the teachers who filled in the questionnaire answered 'very successful'. These sentiments were reflected in the interviews with none of the 11 teachers keen to particularly enthuse about the new syllabus and label it as being 'very successful' but none wanting to label it as being 'not at all successful'. Although none of the teachers interviewed expressed any initial negativity about the new syllabus, a number of criticisms were voiced which were very similar to those expressed on the questionnaires by those who ticked the box 'not at all successful'. This might indicate a greater level of honesty by those filling in the questionnaires or might indicate that the interviewees (mainly panel chairs) were more inclined to look at things in a positive light despite being aware of the problems.

The interviews provided an opportunity to probe further what 'successful' might mean in this situation. It was clear that in fact it meant a variety of things. To some teachers interviewed it merely represented relief at being able to get over a governmental hurdle with the minimum of fuss. To others it was relief that it appeared that they were able to continue doing what they'd always done without having to change their way of teaching too much.

There was also the group who had more pedagogical insight. To the latter group one definition of success was their greater satisfaction with their teaching. For example, they felt they were teaching in a less fragmented way and that their students' productive skills had improved under the new syllabus. A number of teachers expressed satisfaction that the more able students in a class particularly benefited from the new syllabus.

Of course, another frequently referred to definition of success concerned the students. A number commented that the students found the new syllabus more interesting and therefore helped to motivate the students to learn English. However, it appeared that many of the examples provided related more to specific materials provided by publishers (both textbook materials and IT resources) and therefore it is doubtful to what extent this finding represents improvement due to a more interesting syllabus or improvement due to more interesting teaching materials. Of course, it could also be argued that qualities inherent in the syllabus encouraged or allowed more interesting materials to be written around it. To tease these three apart would need further study.

The interviews showed that most teachers thought that in actual fact little had changed in terms of how they taught since the implementation of the new syllabus. Again this finding is consistent with research into the implementation of the primary TOC syllabus (Wong and Pang 2000, Lo 2000). The interviews showed that teachers had added tasks to their teaching but that the tasks had been added to an existing way of teaching. This was put nicely by one teacher who said 'My impression is that they [the other teachers in the panel] have just added in task-based elements'. Another teacher concluded that 'Our teachers teach the areas of task-based teaching and grammar as two different

119

components'. The overall impression was that many teachers did not feel that a revolutionary change in teaching had been implemented and, that as found by Wong and Pang (2000) for the primary TOC syllabus, there were major mismatches between the intended and the implemented curriculum.

It was interesting to see that 26% of the teachers who filled in the questionnaire ticked the strongly worded 'Not at all successful'. Some comments given on the questionnaire clearly related to lack of knowledge of the aims and objectives of the new syllabus – some directly, for example, 'Not know what it is' [sic], others indirectly, for example, 'The aims and objectives are too vague'.

Others comments that were given on the questionnaire appeared to relate to the general difficulties of teaching students English, for example 'Students are not interested in English at all'. Another category related to the point made by Morris (2000, p. 9) when talking about the primary TOC syllabus that many features of the new syllabus were in 'fundamental conflict with the structural features of the system of schooling and the school curriculum'. Examples of such comments include 'Too time consuming when implementing task-based teaching'. This point also came out in the interviews, with teachers commenting that they found that the thematic approach did not give their students sufficient exposure to a wide enough group of vocabulary. They also found that although it was good to fully prepare students for writing tasks, it was also time consuming and as a result they found it difficult to complete the stipulated number of pieces of writing. A number of teachers in the interviews also commented that classes of 40 students made it difficult to implement group work, particularly if the students were badly behaved. Three of the panel chairs interviewed lamented that they would like to implement team teaching and split class teaching to make the lessons more interactive but were unable to do so because of staffing constraints.

A further category that is evident from the comments collected on the questionnaires relates to the syllabus being inappropriate for weak students. Comments included 'It is not suitable for Band 5 students' and 'Most of the students are weak in the subject. They

cannot manage to complete the tasks provided'. Similar comments were also given by the teachers in the interviews, although the sentiment was not unanimous. A number of teachers believed the new syllabus was suitable because it was more active and encouraged participation more. They said that they found it helped to motivate students.

Clearly this issue is a complex one. As pointed out by one teacher, 'Focusing on tasks when students still do not know the letters of the alphabet is clearly a waste of time'. However, does this mean that the syllabus is inappropriate to these students or does it mean that the available teaching material (which reflects the 'expected standard' in Secondary 1) is at an inappropriate level for the majority of Form 1 students in Hong Kong? Might it also mean that the primary school system is currently failing a certain proportion of students by allowing them to complete six years of learning English in primary schools without having attained the basic rudimentary understanding of English, and that this needs to be investigated as an issue in its own right?

A final category identified in the questionnaires related to the support given to teachers. Comments such as 'Lack support' [sic] and 'lack of strong and good leadership' (presumably from the panel chair[28]) and 'Insufficient resources are provided' point to the fact that teachers feel that more could have been done to help them. 'Support' here clearly means 2 things: support in terms of managerial and leadership support, and support in terms of teaching materials. This is consistent with similar comments collected by Lo (2000), who found that primary teachers also had similar complaints. A level of 'team support' from the panel chair and the other English teachers was clearly important to the teachers interviewed. Some appeared to blame the lack of change on their panel chair. One commented that their panel chair did not believe in the new syllabus. Another commented that their chair panel did not know about the new syllabus.

In the interviews, there were few such complaints about managerial and leadership support (although one NET complained that he found that dissemination of information was very hierarchical and that often information got 'stuck' with the panel chair rather than making its way down to the rest of the panel). One possible reason for the relatively

small number of complaints could be that most of the teachers interviewed were actually panel chairs – that is, the leaders themselves!

None of the teachers interviewed complained about insufficient teaching resources either. This finding is in contrast to those of Lo (2000, p. 57) who found that many primary teachers in the school she studied were 'worried about the lack of resources'. In fact, the overwhelming impression was that teachers felt that it was their responsibility to modify and adapt the provided material to suit the needs of their students. This could be one difference between English teachers in primary schools and English teachers in secondary school. The observation mirrors the finding by Sampson (2001), who also found that English teachers in secondary schools felt it was necessary for them to use their professional judgement to adapt materials to suit the needs of their students. The difference in findings between primary school teachers and secondary school teachers is interesting and may reflect the fact that on the whole secondary school teachers are better trained and therefore better equipped to adapt and create their own materials.

One point that did not emerge from the questionnaires but which did emerge clearly in the interviews was that some features of the new syllabus were in fundamental conflict with the expectations of the schooling system. This corroborates the finding of Morris (2000) for the primary TOC syllabus. Some commonly mentioned conflicts included the problems of completing group work with 'large classes of unruly students', the need to give students more individual attention without 'adequate staffing provisions' and the problems of preparing students for the public exams – particularly for the English HKCEE. Talking about this problem in relation to the teaching of grammar, one teacher said 'In the end, they have to face the public exam, which includes large amounts of grammar'. Such teaching for the test is common in Hong Kong and, as identified in a recent report (Strategic Review of the Hong Kong Examinations and Assessment Authority 2003), undermines the aims of reforms such as the TOC syllabus. It is clear that the aims of the public exams need to be revised if such a culture is to be broken.

An interesting point was made by 2 panel chairs. When asked about the success of the new syllabus in their school, they attributed the fact that many of the teachers in their school did not fully understand the nature of task-based teaching to the fact that they never had the opportunity to develop task-based material themselves. Those teachers who had been on training courses that encouraged the writing of materials all commented that they felt that they understood the aims of the new syllabus better as a result of this experience. However, all these teachers qualified this statement by saying that although they had spent several weekends completing such courses, they were not able to follow up on these skills in the school situation due to lack of time.

The issue of whether teachers should be expected to write their own materials is a complex one. Richards (1993) makes the point that one should not necessarily expect good teachers to be good materials writers, acknowledging that at the very least additional training would be necessary. To this one should definitely add the proviso 'time'.

Most of the circularity in these arguments seems to come back to teachers' time or rather lack of it. It is clear that if teachers are expected to write more materials, then they should have their timetables adjusted in order to allow for this. Training should also be given – not just one-off 'shots' of training but training over time. Finally, perhaps it should be considered whether within each school there should be some teachers who are designated 'teacher-writers' based on their interest in and proven skills in materials development. These teachers could lead and to a certain extent support the other teachers in the panel. Often it seems there is scant attention paid to building up areas of expertise and specialisation within panels of teachers. In fact, it is suspected that the problem is even more deep rooted than that – there is a scant attention paid to any form of collegiate sharing and cooperation, something which leaves teachers isolated and unsupported.

The interviews also highlighted one other factor crucial to the implemention of a new syllabus – the importance of on-going training. Many of the teachers interviewed said that they felt that they had learnt more about the new syllabus since its implementation.

This was partly because they had been on more training courses but also because they had had the opportunity to experiment and try out materials. This was particularly true for the panel chairs interviewed. It could not be determined whether the other teachers in the panel benefited from such opportunities but would certainly be worth investigating. If it were found that it was mainly the panel chairs who were being 'selected' to benefit from such opportunities, it would be a shame. On-going training among all members of the English panel would appear to be crucial to the long-term implementation of this syllabus.

The results of one interview in particular also showed the importance of 'external parties' showing long-term interest in the implementation of the syllabus. This particular panel chair explained that although at the time of the implementation of the new syllabus (under the leadership of a now retired panel chair) few if any of the teachers showed interest in or exhibited knowledge of the new syllabus, this had now changed because the school was about to have a quality assurance inspection. Since the teachers anticipated that task-based teaching would be one area judged by the inspectors, the teachers had taken it upon themselves to find out more. Clearly the leadership of better informed panel chair had also played a part in this process too.

The interviews probed some areas not looked at in the questionnaires. One such area was whether teachers were committed to the change or saw the need for change. The overall findings were that very few teachers were either aware of the need for change or had participated in the change. As documented in the literature (Marris 1986, Blackler and Shimmin 1994, White 1988, Kelly 1994), this lack of involvement may account for why on the whole the teachers appeared to take what was offered, modify it, and then adapt it to fit the needs of their students and the norms of the teaching group rather than completely overhaul the way in which they were teaching.

7.3 Helpfulness of textbook in implementing the new syllabus

The four statements on the questionnaire that attempted to gauge whether the teachers thought their textbook had helped them to implement the new syllabus showed an overwhelmingly positive response (with 84.5% agreeing with the statement that 'Our textbook has helped me to implement the new syllabus' and 88.5% agreeing with the statement that 'Our textbook has made teaching the new syllabus easier'). This finding is in common with the findings of Sampson (2001), who found that 74.4% of teachers believed that their textbook could implement the syllabus (the syllabus prior to the TOC syllabus).

This sentiment was also expressed in the interviews, although 1 teacher (an *English Treasure* user) expressed doubts about whether their textbook was really written in line with the new syllabus.

When asked in what way their textbook had helped them, the majority of teachers said that they liked the tasks and that they liked the organised thematic units. Although not relevant to the needs of implementing the new syllabus, a number also mentioned that they appreciated the IT materials and other teaching resource material supplied with the book. This suggested that choosing a textbook that helped them implement the new syllabus was only one of the factors involved in their choice of book.

The interviews clearly showed a high reliance on publishers not only for 'bread and butter' teaching materials such as textbooks but also for newer teaching aids such as IT materials, which were otherwise not available. All the teachers interviewed were adamant that their choice of textbook had helped them implement the new syllabus, with one teacher saying 'I don't know what we would have done without it'. All the teachers interviewed also said that their textbook provided a firm foundation – a core set of materials that they could easily modify and adapt to suit the needs of their students. This last point echoes the sentiments of O'Neill (1992) and provides further evidence for Richards, Tung and Ng's (1992) assertion that most teachers in Hong Kong use textbooks for reasons of pragmatism and convenience.

Although some of the teachers pointed out that the EMB had published some materials for the new TOC syllabus, which they commented were good and were generally more 'daring' than those produced by publishers, they also pointed out that this was no substitute for the comprehensiveness of the textbooks offered by publishers and that they often struggled to work out how to integrate such materials from the EMB into their teaching.

Reification of textbooks, as described by Cunningsworth (1995), was also evident, with many teachers in the interviews attributing qualities such as excellence and authority to not only the materials but also the authors and in some cases the editors too.

The findings suggest that teachers perceived that textbooks had helped them implement the new syllabus and thus were an agent of change. This is consistent with the finding of Hutchinson and Torres (1994, p. 322) who suggest that effective agents of change will 'be those that can create the supporting environment in which teachers will feel able and willing to take on the challenge of the change'. Almost undoubtedly the textbooks were not revolutionary agents of change. They did not provide radically new materials for teachers – 1 teacher in the interviews expressed disappointment about this. However, even this teacher acknowledged that the new textbooks had been welcomed by teachers as they perceived the books as being teacher-friendly and workable in the classroom. He commented that in contrast when teachers had looked at the exemplar materials in the syllabus, they had been worried and alarmed that they couldn't make the new materials work with their students.

7.4 Percentage of time spent teaching with commercially produced materials

There is already plenty of evidence to suggest that textbooks are not only widely used across the world (Zahorik 1991, Shannon 1982, Woodward and Elliott 1990) but also widely used in Hong Kong (Richards, Tung and Ng 1992, Li 1994, Law 1995). This study provides further evidence of this, showing that 55.8% of teachers use commercially produced materials for more than 60% of the time (presumably using school-based materials for the remainder of the time). The actual figure is probably higher since when

asked about school-based materials in the interviews, teachers admitted that much of this material was actually copied from published sources.

Although the study aimed to see if the percentage of time spent teaching with commercially produced materials was affected by variables such as experience, training, banding of the school and being a NET/native speaker, it was found that there was insufficient data to say anything conclusive about this area.

7.5 Purpose of the EMB textbook review process

It appeared that the vast majority of teachers were familiar with the textbook review process, although it was noticed that 6 of the 78 teachers who answered the questionnaire left this section blank, which could have suggested that they didn't know what the question referred to. Two of the teachers interviewed were also unfamiliar with the process.

The questionnaires showed that most teachers believed that checking for accurate language and checking for accurate information was the primary aim of the review process. Checking that textbooks fulfilled the requirements of the syllabus was more often placed second. The one-two placing of these two areas might suggest that teachers consider both to be important in the review process, the placing of accuracy above compliance with the syllabus may have merely indicated their own priorities. It is difficult to discern. In the interviews, teachers often mentioned the two 'in the same breath', with the 7 panel chairs always placing fulfilling the requirements of the syllabus above accuracy.

When asked in the interviews whether this meant they assumed that an approved textbook fulfilled the requirements of the new syllabus, all the teachers who knew of the process agreed. The teacher who had earlier expressed doubts about whether their textbook was written in line with the new syllabus (see above) immediately saw the paradox and showed signs that they were confused by the implication.

In the interviews, the teachers commented that they felt more confident in the books because they believed the members of the textbook review committee to be experts. However, one teacher said he thought that the members of the textbook review committee stifled innovation and were unlikely to pass a book that showed 'radically different elements'. It was clear from the interviews that teachers felt more comfortable choosing a book that had been approved by the textbook review committee. Commenting on this, one of the NETs suggested that teachers liked to 'play safe' and that choosing from a list of approved textbooks allowed this.

7.6   Publishers' knowledge of the new syllabus and their helpfulness in explaining it

The four statements on the questionnaire that attempted to gauge whether the teachers thought that publishers were knowledgeable about the new syllabus produced positive responses (with 88.4% agreeing with the statement that 'Publishers understand the aim of the new syllabus' and 77% agreeing with the statement that 'Publishers were a good source of information about the new syllabus'). The four statements that attempted to gauge whether the teachers thought that publishers had helped them to understand the new syllabus also produced positive responses, although it was interesting that teachers felt less positively about this (with positive responses being in the 60% range rather than in the 70% to 80% range).

This data strongly suggests that teachers felt that they had been supported by the efforts of publishers and that they recognised the expertise of publishers not only in terms of providing educational materials but also in terms of their understanding of broader educational issues. The 11 teachers interviewed also commented positively that they thought publishers not only understood the needs of the syllabus but also their needs. Despite this, the interviews showed that the main source of information about the new syllabus was seminars and workshops run by the EMB and that the publishers had not really been useful in this respect.

128

7.7 The textbook's ability to influence teachers' perceptions of a new syllabus

The results of the questionnaires and the interviews show that teachers in this study perceived that their textbooks had played a role in implementing curriculum change. However, it is interesting to ask the question: Are all textbooks alike in this respect? Can one textbook more than another influence teachers' perception of a syllabus and therefore by implication be perhaps more or less effective in bringing about curriculum change? If not all textbooks are alike in this respect, should stronger measures be put in place to ensure they meet certain criteria and are therefore more alike? For example, should there be a more stringent textbook review process? Should the 'content' of the secondary English syllabus be more extensively defined? Another important question is: Should teachers be given more specific guidance about how to choose textbooks? The implications are large.

This study set out to answer this question above all questions and the results show that significant effects of textbook were found between the two user groups. The *Longman Target English* users agreed more strongly than the *English Treasure* users that:

- the new syllabus is relevant to students' lives
- the new syllabus encourages the use of everyday language
- the new syllabus encourages communication within genuine situations
- the learning targets in the new syllabus are stated more clearly, and that
- publishers understand the aims of the new syllabus

The results show that the teachers' choice of textbook had affected how they felt about the syllabus. It is interesting to speculate on the 'mechanism' by which this might happen. One explanation is that they are equating syllabus with textbook. Therefore, when asked anything about the syllabus, they were in fact supplying information about the textbook. If this were so, why then do we not observe differences in the perceptions they had about their textbook? It may simply be because the questions are different. However, it may also be because their textbook is helping to 'shape' their concept of the syllabus. From these results it is impossible to tell.

Of course, another important question is to speculate about what it is about the two textbooks that make teachers feel this way. As explained in Chapter 1 (p. 23), a critical review of the two textbooks has not been offered in order to avoid bias. However, it is possible to offer some suggestions.

Longman Target English users agreed more strongly than the *English Treasure* users that the new syllabus is relevant to students' lives, that it encourages the use of everyday language, and that it encourages communication within genuine situations. One could try to deal with each of these in turn, however, they are probably best looked at together since it can be argued that they all come down to one key point: the use of 'real English' in 'real situations'.

What is it about *Longman Target English* that might make teachers feel that real English is being used in real situations? It could be the choice of topics and the way in which the topics are 'interpreted'. Although, in Chapter 1 (p. 21), it was stated that many of the topics were similar, there are, of course, differences between the books and certainly large differences in the way the topics are explored. For example, while *English Treasure* relies on a lot of made up information about made up places (shopping centres called Sunnyside Shopping Mall), *Longman Target English* relies more on real information about real places (Festival Walk in Kowloon Tong).

Another factor may be the more obvious presence of tasks in *Longman Target English*. Since the books were approved by the Textbook Committee, one can assume that there must be tasks in *English Treasure*, however, they are not clearly apparent. This observation was made by teachers at the time of the launch. What appears to be a greater reliance on tasks in *Longman Target English* provides greater scope for personalisation and could also have affected how teachers perceived the two courses.

Longman Target English also relies much more heavily on photographs than does *English Treasure*. If illustrations are used, particularly of people, they are often incorporated into photo backgrounds. *Longman Target English* also relies far more

heavily than *English Treasure* on speech bubbles, for example to present language structures. These factors could all help to account for an increased sense of 'realness'.

It is interesting to see that *Longman Target English* users agreed more strongly than the *English Treasure* users that the learning targets in the new syllabus are stated more clearly. It would be interesting to have a clearer picture of what exactly the teachers understood by 'learning targets'. The term is derived from the syllabus document and includes subject targets together with interpersonal dimension targets, knowledge dimension targets and experience dimension targets. However, as pointed out by Walker, Tong and Mok-Cheung (2000) and discussed in Chapter 2 (p. 40) and, as observed in the interviews, to many teachers it may easily have meant grammar.

If, in fact, it was 'learning targets' as defined in the syllabus document, teachers may have felt that the 'Development notes[29]' that accompanied *Longman Target English* helped them to see how the books fulfilled the requirements of the syllabus. The notes that accompany *English Treasure* (in the Teacher's Books) are not as extensive. If it was grammar that teachers were thinking of, it is more difficult to offer a possible explanation. Both series follow a very similar grammar framework and have a clear contents page outlining this framework, both have clearly labelled headings to introduce the grammar sections, and both textbooks teach and practise grammar in a very similar manner.

The results show that the teachers' choice of textbook had affected not only how they felt about the syllabus but also how they felt about publishers. As mentioned in Chapter 5 (p. 107), this finding has both 'business' and 'educational' implications. One important business implication for publishers is that in addition to using price, quality of textbooks and sales service to compete with each other, publishers may also use educational knowledge. The educational implications are more interesting and are best discussed together with the other findings discussed in this section.

If textbooks and publishers can influence teachers' perceptions and beliefs in this way, there are important implications not only for choice of textbook but also for the nature in which textbooks are produced. In particular, there are implications for the relationship between the EMB and publishers, a relationship which, as observed by Tong, Adamson and Che (2000, p. 149), is 'not close'. In interviews with publishers, Sampson (2001, p. 100) reported that 'The area that was found to be of most concern to publishers, however, was their relationship with the government. Repeated criticisms were directed at the EMB for its lack of communication, consultation and transparency'. He goes on to conclude [ibid] that 'All publishers interviewed expressed the hope that greater and more effective channels of communication with the EMB would be established in future'. The benefits to the publishers are clear but this study demonstrates that an improved relationship could also likely benefit the organisation hoping to bring about curriculum change – in this case, the EMB.

7.8   Limitations of the study

No study is without its limitations and this one is no exception. One clear and obvious limitation is the small size of the study. Although the final response rate of 76% was high, the sample size of 78 teachers was relatively small and could usefully have been double the size. A larger sample size would have provided more statistical data and would have helped with validating the structure of the questionnaire.

The same comment applies to the relatively small number of teachers interviewed. The sample size of 11 teachers allowed for the collection of some interesting comments but could usefully have included teachers with a broader range of experiences. The present sample was particularly 'rich' in panel chairs. It would have been useful to include more ordinary teachers and more NETs.

There are other obvious limits to the study. One is the fact that as a result of studying the users of two sets of textbooks favoured by lower-band schools, the schools surveyed were all Band 3 to 5 schools. It would be extremely interesting to repeat the study in higher band schools, perhaps comparing two sets of textbooks favoured by high-band schools.

Two other obvious improvements to this study which could have been included but which this researcher chose not to include because of the dangers of bias were a detailed comparison of the contents of the two textbooks and interviews with members of the publishing community. Had these latter interviews been included, it would have been interesting to include interviews from officials within the EMB too.

7.9   Conclusions

This study is unusual in several respects. It is unusual because it focuses on a seriously neglected area of study – the role of textbooks during times of change. Further, the literature shows that, to date, there has been no similar comparison of texts, making this a first. The study is also of interest because it is one of the first pieces of research to come out about the implementation of the TOC English syllabus to secondary schools.

The study provides a 'snapshot' of a certain period of time and reports on how confident teachers feel they are with the aims of the new syllabus. The study also reports on to what extent they feel the implementation of the new syllabus has been a success. The study shows that although most teachers report that they feel quite confident about the aims of the new syllabus, there is some doubt as to what extent they have a deep understanding of the nature of the syllabus. The study also pinpoints some areas of concern for teachers: in particular, the teaching of grammar and the suitability of the new syllabus for weaker students.

The study confirms previous findings of a high reliance on textbooks in classrooms by teachers. Further, it shows that teachers feel that their textbook had helped them to implement the new syllabus by providing a set of user-friendly materials that they could base their teaching on. Most teachers were found to be aware of the EMB textbook review process and welcomed the process, perceiving that approved textbooks had been checked for language and factual mistakes and fulfilled the requirements of the new syllabus.

The study also shows a close working relationship between teachers and publishers. Interestingly, the study also shows that teachers could perceive differences between publishers in terms of their knowledge of the new syllabus.

The most important finding of the study was found as a result of comparing the perceptions of two groups of users – different only in their choice of textbook. A comparison between these two groups showed that the users of one textbook perceived the syllabus in a different way from the users of the other textbook – the implication being that the two groups of teachers had 'experienced' the syllabus differently.

Further research is clearly indicated. As pointed out previously, a repeat of the study among higher-band students would be particularly interesting. Further research is also clearly needed to find out more about how teachers actually use their textbooks. It would also be interesting to repeat the study in other subjects to see if similar observations are made. Of course, it would also be interesting to revisit these schools in later years to take further 'snapshots' to see if the teachers' perceptions and beliefs about the new syllabus change with time.

BIBLIOGRAPHY

Adamson, R. and Lee, C.K. 'The Future Role of EFL Textbook Resources in Hong Kong.' In *Language and Learning*, Bird, N. (ed), pp. 288-299. Hong Kong: Institute of Language in Education, Hong Kong Education Department, 1994.

Adamson, B. and Yu, H.Y.M. *Developing Materials for TOC English*. Hong Kong: Faculty of Education, The University of Hong Kong, 1997.

Adamson, B. and Morris, P. 'Changing Hong Kong's schools.' In *Changing the Curriculum: The Impact of Reform on Primary Schooling in Hong Kong*, Adamson, B., Kwan, T. and Chan, K.K. (eds), pp. 21-40. Hong Kong: Hong Kong University Press, 2000.

Allwright, R.L. 'What do we want teaching materials for?' *ELT Journal* 36, 1 (1981), pp. 5-18.

Altbach, P.C. and Kelly, G.P. 'Textbooks and the Third World: An Overview.' In *Textbooks in the Third World: Policy, Content and Context*, Altbach, P.C. and Kelly, G.P. (eds), pp. 3-17. New York: Garland, 1988.

Ball, D.L. and Feiman-Nemser, S. 'Using Textbooks and Teacher's Guides: A Dilemma for Beginning Teachers and Teacher Educators.' *Curriculum Inquiry* 18, 4 (1988), pp. 401-423.

Bell, J. *Doing Your Research Project: A Guide for First-time Researchers in Education and Social Science*. Buckingham: Open University Press, 1999.

Bickley, V. 'Doing Best By Teaching Scheme.' *South China Morning Post*, 21 November 1996.

Blackler, F. and Shimmin, S. *Applying Psychology in Organizations*. London: Methuen, 1984.

Breen, M.P. 'Contemporary Paradigms in Syllabus Design.' *Language Teaching* 20, 3 (1987), pp. 157-174.

Carless, D. 'Managing Systemic Curriculum Change: A Critical Analysis of Hong Kong's Target-Orientated Curriculum Initiative.' In *Curriculum and Assessment for Hong Kong: Two Components, One System*, Stimpson, P. and Morris, P. (eds), pp. 223-244. Hong Kong: Open University of Hong Kong Press, 1998.

Cheng, Y.C. 'Effectiveness of curriculum change in schools: An organisational perspective.' *International Journal of Educational Management* 8, 3 (1994), pp. 26-34.

Cherry, A.L. *A Research Primer for the Helping Professions: Methods, Statistics, and Writing*. Belmont: Wadsworth Publishing Company, 1999.

Clark, J.L. *Curriculum Renewal in School Foreign Language Learning*. Oxford: Oxford University Press, 1987.

Clark, J., Scarino, A. and Brownell, J.A. *Improving the Quality of Learning: A Framework for Target Orientated Curriculum Renewal in Hong Kong*. Hong Kong: Institute of Language in Education, 1994.

Cohen, J. *Statistical Power Analysis for the Behavioral Sciences*. New York: Academic Press, 1969.

Cohen, L. and Manion, L. *Research Methods in Education (Fourth Edition)*. London: Routledge, 1994.

Cunningsworth, A. *Choosing your Coursebook*. Oxford: Macmillan-Heinemann, 1995.

Curriculum Development Council web site: cd.ed.gov.hk.

Curriculum Development Council. *(Provisional) Syllabus for Secondary Schools: English*. Hong Kong: Government Printer, 1975.

Curriculum Development Council. *Syllabus for Secondary Schools: English*. Hong Kong: Government Printer, 1983.

Curriculum Development Council. *Syllabuses for Secondary Schools: English Language Secondary 1-5*. Hong Kong: Government Printer, 1999.

Curriculum Development Council. *Learning to Learn: The Way Forward in Curriculum Development*. Hong Kong: Government Printer, 2000a.

Curriculum Development Council. *Learning to Learn: Key Learning Area – English Language Education*. Hong Kong: Government Printer, 2000b.

Dimmock, C. and Walker, A. 'Hong Kong's Change of Sovereignty: School Leaders' Perceptions of the Effects on Educational Policy and School Administration.' *Comparative Education* 33, 2 (1997), pp. 277-302.

Education Commission. *Education Commission Report Number 4: The Curriculum and Behavioural Problems in Schools*. Hong Kong: Government Printer, 1990.

Education Department. *Report of the Working Group Set Up to Review Language Improvement Measures*. Hong Kong: Government Printer, 1989.

Education Department. 'Notes on Selection of Textbooks/Learning Materials for Use in Schools.' *School Curriculum Circular No. 2/2000.* Hong Kong: Education Department, 2000.

Education and Manpower Bureau. *Information Technology for Learning in a New Era: Five-Year Strategy 1998/99 to 2002/03.* Hong Kong: Government Printer, 1998.

Education and Manpower Bureau. *Education Statistics.* Hong Kong: Government Printer, 2002.

Eisner, E.W. *The Enlightened Eye: Qualitative Enquiry and the Enhancement of Educational Practice.* New York: Macmillan, 1991.

Elliott, D.L. and Woodward, A. 'Preface.' In *Textbooks and Schooling in the United States,* Elliott, D.L. and Woodward, A. (eds), pp. vii-viii. Chicago: The University of Chicago Press, 1990.

Flude, M. and Hammer, M. 'Introduction.' In *The Education Reform Act 1988: Its Origins and Implications,* Flude, M. and Hammer, M. (eds), pp. vii-xvii. Basingstoke: The Falmer Press, 1990.

Forestier, K. 'Education Off-target.' *South China Morning Post,* 16 November 1996.

Francis, R. 'Hong Kong – the Critical Bridge.' *The Bookseller,* 12 April, 2002.

Glatthorn, A.A. *Curriculum Leadership.* New York: Harper Collins, 1987.

Goodlad, J. *et al. Curriculum Inquiry: The Study of Curriculum Practice.* New York: McGraw-Hill, 1979.

Graves, N. 'Textbooks and Textbook Research in Geographical Education: Some International Views.' *International Research in Geographical and Environmental Education* 6, 1 (1997), pp. 27-52.

Hargreaves, D. *Teaching as a Research-based Profession: Possibilities and Prospects.* Teacher Training Agency: London, 1996.

Hong Kong Examinations and Assessment Authority. *Strategic Review of the Hong Kong Examinations and Assessment Authority.* Hong Kong: Hong Kong Examinations and Assessment Authority, 2003.

Hopkin, J.W. 'The Worldview of Geography Textbooks: Interpretations of the National Curriculum.' Unpublished PhD Thesis: University of Birmingham, 1998.

137

Hutchinson, T. and Torres, E. 'The textbook as agent of change.' *ELT Journal* 48, 4 (1994), pp. 315-328.

Johnson, E.B. *Textbooks in the Kaleidoscope*. Norway: Scandinavian University Press, 1993.

Jones, K. 'A Regrettable Oversight or a Significant Omission? Ethical Considerations in Quantitative Research in Education.' In *Situation Ethics in Educational Research*, Simons, H. and Usher, U. (eds), pp. 147-161. London: RoutledgeFalmer, 2000.

Kelly, A.V. *The National Curriculum: A Critical Review*. London: Paul Chapman Publishing Ltd, 1994.

Kingdon, J. *Agendas, Alternatives, and Public Policies*. Boston: Little, Brown, 1984.

Kirsch, G. *Ethical Dilemmas in Feminist Research: The Politics of Location, Interpretation and Publication*. Albany: State University of New York Press, 1999.

Law, W.H. 'Teachers' Evaluation of English Textbooks: An Investigation of Teachers' Ideas and Current Practices and their Implications for Developing Textbook Evaluation Criteria.' Unpublished MEd Thesis: The University of Hong Kong, 1995.

Lee, W.O. 'The Cultural Context for Chinese Learners: Conceptions of Learning in the Confucian Tradition.' In *The Chinese Learner: Cultural, Psychological and Contextual Influences*, Watkins, D.A. and Biggs, J.B. (eds), pp. 25-41. Hong Kong: Comparative Education Research Centre, 1996.

Li, Y.C. 'Washback Effect: How Does it Influence Teaching? Implications for Hong Kong.' (Unpublished paper presented at ILEC 1994)

Lidstone, J. 'Research in Geographical Education.' In *Developing Skills in Geographical Education*, Gerber, R. and Lidstone, J. (eds), pp. 273-285. Brisbane: Jacaranda Press, 1988.

Lo, M.L. 'Learning Without Tears? The Relativity of a Curriculum Reform and Its Impact.' In *Changing the Curriculum: The Impact of Reform on Primary Schooling in Hong Kong*, Adamson, B., Kwan, T. and Chan, K.K. (eds), pp. 47-79. Hong Kong: Hong Kong University Press, 2000.

March, J. and Olsen, J. *Ambiguity and Choice in Organisations*. Norway: Bergen, 1984.

Markee, N. *Managing Curricular Innovation*. Cambridge: Cambridge University Press, 1997.

Marris, P. *Loss and Change*. London: Routledge, 1986.

Marsden, W.E. *The School Textbook: Geography, History and Social Studies*. London: Woburn Press, 2001.

Marsh, C. and Stafford, K. Curriculum Practices and *Issues* (2nd Ed). Sydney: McGraw-Hill, 1988.

McDonough, J and McDonough, S. *Research Methods for English Language Teachers*. London: Arnold, 1997.

Mertens, D.M. *Research Methods in Education and Psychology: Integrating Diversity with Quantitative and Qualitative Approaches*. Thousand Oaks, California: Sage, 1998.

Morris, P. *The Hong Kong School Curriculum: Development, Issues and Policies*. Hong Kong: Hong Kong University Press, 1995.

Morris, P. 'The Management of Participation in the Policy-making Process: The Case of the Education Commission in Hong Kong.' *Journal of Education Policy* 11, 3 (1996), pp. 319-336.

Morris, P. 'The Commissioning and Decommissioning of Curriculum Reforms.' In *Changing the Curriculum: The Impact of Reform on Primary Schooling in Hong Kong*, Adamson, B., Kwan, T. and Chan, K.K. (eds), pp. 21-40. Hong Kong: Hong Kong University Press, 2000.

Morris, P, Adamson, R., Au, M.L., Chan, K.K., Chan, W.Y., Ko, P.Y., Lai, A.Y., Lo, M.L., Morris, E., Ng, F.P., Ng, Y.Y., Wong, W.M., Wong, P.H. *Target Orientated Curriculum Evaluation Project: Interim Report*. Hong Kong: INSTEP, Faculty of Education, the University of Hong Kong, 1996.

Nunan, D. *Designing Tasks for the Communicative Classroom*. Cambridge: Cambridge University Press, 1989.

Nunnally, J.C. *Psychometric Theory*. New York: McGraw-Hill, 1978.

O'Neill, R. 'Why Use Textbooks?' *ELT Journal*, 36, 2 (1982), pp. 104-111.

Richards, J.C., Tung, P. and Ng, P. 'The Culture of the English Language Teacher: A Hong Kong Example.' *RELC Journal* 23, 1 (1992), pp. 81-102.

Richards, J.C. 'Beyond the Textbook: The Role of Commercial Materials in Language Teaching.' *RELC Journal* 24, 1 (1993), pp. 1-14.

Rivers, W.M. 'Mental Representations and Language in Action.' *Canadian Modern Language Review* 47 (1991), pp. 249-265.

Rust, J. and Golombok, S. *Modern Psychometrics: The Science of Psychological Assessment*. London: Routledge, 1992.

Sackett, D.L. 'Bias in Analytical Research.' *Journal of Chronic Diseases* 32 (1979), pp. 57-63.

Sampson, N. 'Teachers' Perceptions of ELT Textbooks: A Critical Investigation into Teachers' Use and Evaluation of Textbooks and the Underlying Publisher-Educator-Government Relationships.' Unpublished MEd Thesis: University of Sheffield, 2001.

Sayler, J.G., Alexander, W.M. and Lewis A.J., *Curriculum Planning for Better Teaching and Learning* (4th Ed). New York: Holt, Rinehart and Winston, 1981.

Seliger, H.W. and Shohamy, E. *Second Language Research Methods*. Oxford: Oxford University Press, 2000.

Shannon, P. 'Some Subjective Reasons for Teachers' Reliance on Commercial Reading Materials.' *Reading Teacher* 36 (1982), pp. 884-889.

Shannon, P. 'Commercial Reading Materials: a Technological Ideology, and the Deskilling of Teachers.' *The Elementary School Journal* 87, 3 (1987), pp. 307-329.

Sheldon, L. 'Introduction.' In *ELT Textbooks and Materials: Problems in Evaluation and Development*, Sheldon, L. (ed), pp. 1-10. Oxford: Modern English Publications, 1997.

South China Morning Post. 'Strong Support for New Curriculum.' *South China Morning Post*, 24 March 1995.

Spector, P.E. 'Choosing Response Categories for Summated Rating Scales.' *Journal of Applied Psychology* 61 (1976), pp. 374-375.

Spector, P.E. 'Ratings of Equal and Unequal Response Choice Intervals.' *Journal of Social Psychology* 112 (1980), pp. 115-119.

Spector, P.E. *Summated Rating Scale Construction Series: Quantitative Applications in the Social Sciences*. Newbury Park: Sage Publications, 1992.

Stern, H.H. *Issues and Options in Language Teaching*. Oxford: Oxford University Press, 1992.

Stimpson, P. and Morris, P. *Curriculum and Assessment for Hong Kong: Two Components, One System*. Hong Kong: Open University of Hong Kong Press, 1998.

Stray, C. 'Paradigms Regained: Towards a Historical Sociology of the Textbook.' *Journal of Curriculum Studies* 26, 1 (1994), pp. 1-29.

Sweeting, A.E. *A Phoenix Transformed: The Reconstruction of Education in Post-war Hong Kong*. Hong Kong: Oxford University Press, 1993.

Sweeting, A.E. 'Education Policy and the 1997 Factor: The Art of the Possible Interacting with the Dismal Science.' In *Education and Political Transitions: Implications of Hong Kong's Change of Sovereignty*, Bray, M. and Lee, W.O. (eds), pp. 25-40. Hong Kong: University of Hong Kong, Comparative Education Research Centre, 1997.

Tang, C. and Biggs, J.B. 'How Hong Kong Students Cope with Assessment.' In *The Chinese Learner: Cultural, Psychological and Contextual Influences*, Watkins, D.A and Biggs, J.B. (eds), pp. 159-182. Hong Kong: Comparative Education Research Centre, 1996.

Tong, A., Adamson, B. and Che, M. 'Tasks in English Language and Chinese Language.' In *Changing the Curriculum: The Impact of Reform on Primary Schooling in Hong Kong*, Adamson, B., Kwan, T. and Chan, K.K. (eds), pp. 145-173. Hong Kong: Hong Kong University Press, 2000.

Torres, E.G. 'The Role of Textbooks in Classroom Second Language Learning: Teachers' and Learners' Classroom Use of a Fisheries-based ESP Textbook in the Philippines.' Unpublished PhD Thesis: Lancaster University, 1994.

Tsang, Y.S. 'When Teachers Fail, What Chance have our Students.' *South China Morning Post*, 19 June 2003.

Tyler, R.W. 'The Curriculum Then and Now.' In *Proceedings of the 1956 Invitational Conference on Testing Problems*. Princeton, New Jersey: Educational Testing Service, 1957.

Van den Akker, J.J. 'The Teacher as Learner in Curriculum Implementation.' *Journal of Curriculum Studies* 20, 1 (1988), pp. 47-55.

Venezky, R.L. 'Textbooks in School and Society.' In *Handbook of Research on Curriculum*, Jackson, P.W. (ed), pp. 436-61. New York: Macmillan, 1992.

Walker, E. 'An Analysis of Changes in the Aims and Objectives of the Secondary English Syllabi (1975-1999).' In *School Curriculum Change and Development in Hong Kong*, Cheng, Y.C., Chow, K.W. and Tsui, K.T. (eds), pp. 227-257. Hong Kong: Centre for Research and International Collaboration, 2000.

Walker, E., Tong, A. and Mok-Cheung, A. 'Changes in Secondary School English Teaching Methodologies and Content (1975-1999)' In *School Curriculum Change and Development in Hong Kong*, Cheng, Y.C., Chow, K.W. and Tsui, K.T. (eds), pp. 259-293. Hong Kong: Centre for Research and International Collaboration, 2000.

Walford, G. *Doing Qualitative Educational Research: A Personal Guide to the Research Process*. London: Continuum, 2001.

Walonick, D.S. *Survival Statistics*. Minneapolis: StatPac Inc, 1997.

Weiss, C. 'Knowledge Creep and Decision Accretion.' *Knowledge: Creation, Diffusion and Utilization* 1, 3 (1980), pp. 381-404.

Westaway, J. and Rawlings, E. 'An Analysis of Key Stage 3 Geography Textbooks.' *Teaching Geography* 22, 1 (1998), pp. 36-38.

Westbury, I. 'Textbooks, Textbook Publishers, and the Quality of Schooling.' In *Textbooks and Schooling in the United States*, Elliott, D.L. and Woodward, A. (eds), pp. 1-22. Chicago: The University of Chicago Press, 1990.

White, R. *The ELT Curriculum*. Oxford: Blackwell, 1988.

Wong, S.Y. and Pang, Y.M. 'An Analysis of the Primary English Curriculum: Mismatches and Implications.' In *School Curriculum Change and Development in Hong Kong*, Cheng, Y.C., Chow, K.W. and Tsui, K.T. (eds), pp. 295-310. Hong Kong: Centre for Research and International Collaboration, 2000.

Woodward, A. and Elliott, D.L. 'Textbooks, Curriculum and School Improvement.' In *Textbooks and Schooling in the United States*, Elliott, D.L. and Woodward, A. (eds), pp. 222-232. Chicago: The University of Chicago Press, 1990.

Wright, D.R. 'Ten Approaches to Textbook Research in Geographical and Environmental Education.' *Internationale Schulbuchforschung, Newsletter* 5, 18 (1996), pp. 3-14.

Zahorik, J.A. 'Teaching Styles and Textbooks.' *Teaching & Teacher Education* 7, 2 (1991), pp. 185-196.

Zeni, J. 'Introduction.' In *Ethical Issues in Practitioner Research*, Zeni, J. (ed), pp. ix-xxi. New York: Teachers College Press, 2001.

END NOTES

1   Students in Secondary 1 (also commonly called Form 1) are aged 12 to 13.

2   Schools were given the option to opt into TOC when they felt the time was right. 76 primary schools started TOC in September 1995. In September 1996, this figure leapt to 500 schools. In 1997, the existing 1981 syllabus was revised to incorporate the TOC framework into a new syllabus (the 1997 syllabus).

3   Teaching of English in Forms 6 and 7 is almost entirely dominated by the AS Use of English examination (which is sat at the end of Form 7). The introduction of TOC to these forms attracted very little attention. From the publishers' point of view, it also caused little upheaval since most books sold at this level are exam practice books and also because it is not necessary for Form 6/7 textbooks to be approved by the ED.

4   The membership of the CDC English Language Subject Committee for Secondary in 1999 (the time at which the CDC syllabus for Secondary English was released) comprised fewer than 15 people. All of the senior members except the chairman were members of the CDI.

5   Although schools have the option to change their choice of textbook every year, it is 'frowned upon' by school administrations and an extremely strong case must be made for change. Considering change after three years is much more usual.

6   A briefing for publishers alone was held by the CDI in the autumn of 1999. Publishers were invited to earlier briefings for teachers but requested not to ask questions during the meetings.

7   The time reference 'now' of course means 'in 2000' – the year in which the paper was published.

8   The Academic Aptitude Test comprised three parts: Maths, Chinese and Logic. There was no English component to it. It was used as part of the secondary school selection process.

9   The average class size in 2000/2001 for Secondary 1-5 was 38.3 (Education and Manpower Bureau 2002).

10 Panel chairs lead the 'panel' of English teachers in a school and as such function as a head of department. In some schools there is one panel chair responsible for all the English teaches in a school. In other schools, there is a junior panel chair (responsible for Forms 1 to 3) and a senior panel chair (responsible for Forms 4 to 7).

11 Benchmarking Hong Kong's language teachers was proposed by the EMB (then called the ED) as a way of raising what it perceived to be the poor language standards of Hong Kong's English and Putonghua teachers. The scheme requires that all English

and Putonghua take a benchmark test by 2005, either by taking an official examination or attending a recognised training programme. If teachers fail the tests they will be asked to teach other subjects.

12 Walker, Tong and Mok-Cheung (2000, p. 266) use Clark's (1987) terminology to classify methodology. They define classical humanism as 'Transmissive, teacher-directed teaching to promote conscious understanding of the rules behind surface phenomena and accuracy when applying them in other contexts'. They describe the content of the 1975 syllabus as 'Valued structural elements of a language (phonological, grammatical, and lexical) plus literary texts of value; presented in pre-ordained sequence from what was thought to be simple to what was thought to be more complex'.

13 Walker, Tong and Mok-Cheung (2000, p. 266) define reconstructionism as 'Good-habit forming; practice of part-skills, rehearsal of behavioural goals; rely on practice and memory'. They describe the content of the 1983 syllabus as 'Content set in terms of situations, themes, functions, or notions; progressed in a linear fashion through the various situations; emphasized discrete language skills listening, speaking, reading and writing; progression began with the most useful, generalizable or the most learnable'.

14 Walker, Tong and Mok-Cheung (2000, p. 266) define progressivism as 'Contextualized, learner-centered learning processes such as experiential learning, inquiring, conceptualizing, communicating, and reasoning, usually involving holistic, unpredictable and spontaneous language use; learner responsibility and autonomy are stressed'. They describe the content of the 1999 syllabus as 'Valued series of activities and tasks, as authentic as possible, often selected in negotiation with learners, who may learn different things from the same task; tasks may be graded beforehand based on past experience or perceived complexity; learning is gradual and cyclical, with language elements recycled in different contexts'.

15 The 10 educational journals were the *British Educational Research Journal, British Journal of Educational Studies, British Journal of Sociology of Education, Cambridge Journal of Education, Curriculum, Educational Research, Educational Studies, Journal of Education for Teaching, Oxford Review of Education* and *Research in Education*. Marsden notes significantly more interest in the *Journal of Curriculum Studies* but attributes this to American editorial control.

16 There are a number of similarities between the textbook markets of the US and Hong Kong. Firstly as noted in the text, both rely on students to buy their own copies of textbooks, which means that the value of the textbook market in these areas is relatively high compared with countries like the UK. The high market value ensures an extremely competitive market, whereby publishers expend a huge amount of effort and money in persuading teachers to adopt or use their books. This leads to highly colourful, attractive student books, and many free components being offered to teachers, extensive teacher's guides. The second similarity is that in many parts of the

144

US, selection is made from a state-approved list as is the case in Hong Kong. This may also be another reason for the heightened interest in studying textbooks.

17 In 1991/92, only 68.6% of secondary teachers had a degree qualification (but maybe not a relevant degree qualification) and only 73.3% were trained teachers. In 2001/02, these figures were 86% and 84.2%, respectively (Education and Manpower Bureau, 2002).

18 In 2000/01, 441 teachers were employed under the Native-speaking English Teacher Scheme (Education and Manpower Bureau, 2002).

19 Allwright (1981) explored this point in an article titled 'What do we want teaching materials for?'. He answers the question by taking two different approaches: the deficiency view and the difference view. According to the deficiency view, we need teaching material to save learners from the deficiency of teachers, that is to ensure that the syllabus is properly covered, that exercises are well thought out, and perhaps where English is taught by non-native-speaking teachers that the English is correct and natural. At one extreme, Allwright suggests (p. 6) 'that the "best" teachers would neither want nor need published teaching materials'. At the other extreme, he suggests (p. 6) 'that we would have "teacher-proof" material that no teacher, however deficient, would be able to teach badly with'. The other view, the difference view, suggests (p. 6) 'that teachers need teaching material as "carriers" of decisions best made by someone other than the classroom teacher, not because the classroom teacher is deficient, as a classroom teacher, but because the expertise required of materials writers is importantly different from that required of classroom teachers'.

20 In 2001, the banding system was changed from five bands to three bands. Despite the change, many teachers still use the old banding system to describe their school. On the questionnaire, it was requested that teachers use the old system to label their school in the belief that it would provide more accurate information about the ability of the students studying in the school.

21 As pointed out by Spector (1992, p. 1), 'the summated rating scale is one of the most frequently used tools in the social sciences'. A summated rating scale has four characteristics, which make it particularly suitable for an investigation such as this. The characteristics are as follows.
a) Each individual item must measure something that has an underlying quantitative measurement continuum. It is therefore particularly suitable for measuring things like attitudes and beliefs, which can vary from being very favourable to very unfavourable.
b) Each item must have no 'right' answer and therefore cannot be used to test knowledge or 'ability'. This factor distinguishes this type of scale from the multiple-choice part of the questionnaire, which asked about more definite things, such as percentage of the time spent teaching with commercially produced materials and even more definite personal opinions.

c) The scale contains multiple items, which are later combined or summed. As pointed out by Spector (1992, p. 6), multiple items help to improve precision since they avoid a single question that may oversimplify how people feel. Also, the variety of questions can enlarge the scope of what is measured, again resulting in greater precision as long as the items are actually measuring the same thing. Reliability is also improved since random errors of measurement tend to average out across the items.

d) Finally, each item is a statement and respondents are asked to give (usually between four and seven) ratings to each statement. The use of several response choices, it is argued (Spector 1992, p. 5), increases precision as 'those who feel strongly can now be distinguished from those with more moderate feelings'. It also helps to protect against unreliability or inconsistency over time since ambivalent people may essentially make random choices to yes/no questions.

Summated rating scales also have limitations. A 'good' summated rating scale will have good test-retest reliability (i.e. constant measurements over time), good internal-consistency reliability (i.e. multiple items designed to measure the same construct will intercorrelate with each other), good validity (i.e. that the scale measures its intended construct), clear well written statements, statements that contain a single idea, and statements that are appropriate for the population who will use it (i.e. statements that are easily readable and free of possible biasing factors such as personally sensitive items) (Spector 1992). In many ways, it is therefore desirable to use a scale that has demonstrated itself in previous studies to be 'good'. However, in many studies (this one included) re-using an existing scale is not possible because no such scale exists.

22 As explained by Spector (1992, p. 30), 'Internal consistency is a measurable property of items that implies that they measure the same construct. It reflects the extent to which items intercorrelate with one another. Failure to intercorrelate is an indication that the items do not represent a common underlying construct. Internal consistency among a set of items suggests that they share common variance or that they are indicators of the same underlying construct'. Importantly, as Spector warns, 'The nature of that construct or constructs is certainly open to question'.

23 Possible reasons for being confused by the negatively worded statements include the presence of double negatives or because the teachers simply failed to see the word 'NOT' (although this word was deliberately placed in bold, capital letters to attempt to make it obvious).

24 The data justified the assumption of equal variance in all cases, except Scale 9.

25 It should be noted at this point that these t-tests test at the 5% level of significance, which means there is always a 5% chance of a type 1 error occurring (when, due to a sampling fluke, the data analysis leads us to reject the null hypothesis when, in fact, it is true). Put in other words, we would expect one in twenty to be wrong.

26 The data justified the assumption of equal variance in all cases, except Statement 1.

27 The CMI policy was implemented in September 1998. Prior to this date, the vast majority of secondary schools (approximately 80%) used English as the medium of instruction. After this date, the majority switched to Chinese as the medium of instruction, leaving approximately 20% (all high band school) still using English. The schools in this study were all EMI schools prior to September 1998. They are all CMI schools now.

28 These comments were all made by non-panel chairs. Hence it is assumed that they refer to the panel chair's leadership (or lack of it). However, it cannot be discounted that the comments may, in fact, refer to the leadership of the authorities, e.g. the EMB.

29 The 'Development notes' referred to here were prepared for the EMB by the publisher to indicate how the structure of the book was designed to fulfil the requirement of the syllabus. They were subsequently made available to teachers.

APPENDICES
Appendix 1: Research questionnaire

<u>Personal information</u>

Position held: English teacher ❑   NET ❑   English panel chair ❑

Forms taught: 1 ❑   2 ❑   3 ❑   4 ❑   5 ❑   6 ❑   7 ❑

Native English speaker: Yes ❑   No ❑

School band (old system):   1 ❑   2 ❑   3 ❑   4 ❑   5 ❑

Medium of instruction: CMI ❑   EMI ❑

English teaching experience: Less than 5 years ❑   More than 5 years ❑

Subject trained: Yes ❑   No ❑

Textbook used: *English Treasure* ❑   *Longman Target English* ❑

___

1 What percentage of class time do you spend teaching with commercially produced materials?

20% or less ❑   20-40% ❑   40-60% ❑   60-80% ❑   80% or more ❑

2 How confident are you that you are familiar with the aims of the new CDC syllabus for English?

Very confident ❑   Quite confident ❑   Not at all confident ❑

3 How did you find out about the aims of the new CDC syllabus? Tick as many boxes as necessary.

ED seminars/workshops ❑   ED training courses ❑   Publishers' seminars/workshops ❑
Syllabus documents ❑   Panel chair ❑   Other colleagues ❑

4 How successful do you think the implementation of the new syllabus has been in your school?

Very successful ❑   Quite successful ❑   Not at all successful ❑

If you answer 'Not at all successful', please indicate why you think this: _____

___

5 What do you believe is the purpose of the ED textbook review process? Please rank the following statements according to priority. 1 = most important.

The purpose of the ED textbook review process is to ensure:
i)   that textbooks contain accurate language   ____
ii)   that the learning tasks/exercises fulfil the requirements of the syllabus   ____
iii)   that textbooks do not contain inaccurate information   ____
iv)   complete coverage of the learning targets/objectives in the syllabus   ____
v)   that textbooks are not too heavy   ____
vi)   others (please state what) _____   ____

The following statements concern your beliefs about the implementation of the new CDC syllabus (1999) and the textbook that you are using in Forms 1 and 2. Please read the statements and circle <u>a number</u> based on the following scale:

1 = **D**isagree strongly	5 = **A**gree slightly
2 = **D**isagree quite a lot	6 = **A**gree moderately
3 = **D**isagree moderately	7 = **A**gree quite a lot
4 = **D**isagree slightly	8 = **A**gree strongly

---

1 The new syllabus is relevant to students' lives.   **D** 1 2 3 4 5 6 7 8 **A**

2 The new syllabus encourages 'learning through doing' rather than   **D** 1 2 3 4 5 6 7 8 **A**
rote learning.

3 The new syllabus encourages the use of meaningful tasks.   **D** 1 2 3 4 5 6 7 8 **A**

4 Our textbook has helped me to implement the new syllabus.   **D** 1 2 3 4 5 6 7 8 **A**

5 The new syllabus encourages the use of everyday language.   **D** 1 2 3 4 5 6 7 8 **A**

6 Publishers understand the aims of the new syllabus.   **D** 1 2 3 4 5 6 7 8 **A**

7 Publishers helped explain the new syllabus to teachers.   **D** 1 2 3 4 5 6 7 8 **A**

8 The new syllabus clearly defines the purposes of learning English   **D** 1 2 3 4 5 6 7 8 **A**
through the use of targets.

9 Our textbook is written in line with the new CDC syllabus.   **D** 1 2 3 4 5 6 7 8 **A**

10 The new syllabus encourages students to learn English within a context. **D** 1 2 3 4 5 6 7 8 **A**

11 Our textbook has made implementing the new syllabus difficult.   **D** 1 2 3 4 5 6 7 8 **A**

12 With the new syllabus, students are **NOT** encouraged to complete meaningful tasks.   <u>D</u> 1 2 3 4 5 6 7 8 <u>A</u>

13 Our textbook follows the guidelines laid down in the new syllabus.   <u>D</u> 1 2 3 4 5 6 7 8 <u>A</u>

14 Publishers held useful seminars/workshops to explain the new syllabus. <u>D</u> 1 2 3 4 5 6 7 8 <u>A</u>

15 The new syllabus is based upon experiential learning.   <u>D</u> 1 2 3 4 5 6 7 8 <u>A</u>

16 The new syllabus encourages communication within genuine situations. <u>D</u> 1 2 3 4 5 6 7 8 <u>A</u>

17 With the new syllabus, the learning targets are stated more clearly.   <u>D</u> 1 2 3 4 5 6 7 8 <u>A</u>

18 The new syllabus does **NOT** encourage the teaching of everyday English.   <u>D</u> 1 2 3 4 5 6 7 8 <u>A</u>

19 Publishers did **NOT** help me to understand the new syllabus.   <u>D</u> 1 2 3 4 5 6 7 8 <u>A</u>

20 Our textbook has made teaching the new syllabus easier.   <u>D</u> 1 2 3 4 5 6 7 8 <u>A</u>

21 The new syllabus encourages learners to work according to specific learning targets.   <u>D</u> 1 2 3 4 5 6 7 8 <u>A</u>

22 With the new syllabus, students learn from the experience of completing meaningful learning activities.   <u>D</u> 1 2 3 4 5 6 7 8 <u>A</u>

23 Our textbook does **NOT** reflect the aims of the new syllabus.   <u>D</u> 1 2 3 4 5 6 7 8 <u>A</u>

24 With the new syllabus, students' learning is focussed upon the completion of tasks.   <u>D</u> 1 2 3 4 5 6 7 8 <u>A</u>

25 The new syllabus does **NOT** encourage language use in authentic situations.   <u>D</u> 1 2 3 4 5 6 7 8 <u>A</u>

26 Publishers were a good source of information about the new syllabus.   <u>D</u> 1 2 3 4 5 6 7 8 <u>A</u>

27 Publishers are knowledgeable about the new syllabus.   <u>D</u> 1 2 3 4 5 6 7 8 <u>A</u>

28 With the new syllabus, students use the language within contextualised <u>D</u> 1 2 3 4 5 6 7 8 <u>A</u> situations.

29 The new syllabus does **NOT** have clearly stated learning targets.   <u>D</u> 1 2 3 4 5 6 7 8 <u>A</u>

30 The new syllabus places emphasis on learning to communicate through purposeful tasks.   **D** 1 2 3 4 5 6 7 8 **A**

31 Publishers do **NOT** understand the aims of the new syllabus.   **D** 1 2 3 4 5 6 7 8 **A**

32 The new syllabus covers material that is part of students' lives.   **D** 1 2 3 4 5 6 7 8 **A**

33 Our textbook is designed to support the new syllabus.   **D** 1 2 3 4 5 6 7 8 **A**

34 Our textbook has facilitated the implementation of the new syllabus.   **D** 1 2 3 4 5 6 7 8 **A**

35 The new syllabus encourages rote learning.   **D** 1 2 3 4 5 6 7 8 **A**

36 Publishers helped me to understand the new syllabus.   **D** 1 2 3 4 5 6 7 8 **A**

Thank you! Please pass the questionnaire back to your panel chair.

Appendix 2: Letter to teachers

[Address]

5th December 2002

Dear English Teacher

Thank you for filling in this questionnaire, the results of which will be used as part of a Doctor of Education study.

Please allow me to reassure you that <u>all</u> information given will be kept strictly confidential and no reference to individuals or schools will be made in any discussion of the questionnaire results. The questionnaires will also be destroyed after use.

Thank you again and have a very Merry Christmas.

Yours sincerely

Sarah Rigby
[Telephone number]

Appendix 3: Letter to panel chairs

[Address]

5th December 2002

Dear English Panel Chair

I would like to seek your assistance in asking the Form 1 and Form 2 teachers in your panel to complete a quick questionnaire about their experience of teaching the new secondary English syllabus (CDC, 1999). I will use the results of the questionnaires to finish off my Doctor of Education, which I am currently doing by distance learning with Durham University in the UK.

Of course, I should say that <u>all</u> information given to me will be kept strictly confidential and no reference to individuals or schools will be made in any discussion of the questionnaire results. The questionnaires will also be destroyed after use.

I hope that you will be able to assist me in distributing these questionnaires before the Christmas holidays in order that they can be picked up again in the second week of January. I will then be in a position to share some of my findings with you before Chinese New Year if you wish.

Thank you in advance for your help and please be assured that all information gathered will be used positively in the service of Hong Kong teachers and students.

Yours sincerely

Sarah Rigby
[Telephone number]

Appendix 4: Interview schedule

1 The new CDC syllabus was implemented in September 2001. How successful do you think the new syllabus has been in your school?
- introduced smoothy
- helped assist students' learning

2 How have your colleagues found the new syllabus?

3 What things have you liked about the new syllabus?

4 What have been some of the problems you have encountered?

5 Do you feel confident that you are familiar with the aims of the new syllabus?

6 How did you and the teachers in your panel find out about the new syllabus? Did you go to any of the seminars held by publishers? Were they useful in helping you to understand the new syllabus?

7 At the time the new syllabus was proposed, do you feel you understood why a new syllabus was being introduced?

8 Do you think your choice of textbook has helped you to implement the new syllabus? Why?/Why not?

9 Are you aware that all textbooks must be passed by the textbook review committee? Do you know what the purpose of this procedure is?

10 Do you think the review process is a good idea? Why?/Why not?

11 If a textbook has been passed by the textbook review committee, do you feel confident that it conforms with the needs of the new syllabus?

12 How do you feel about publishers in Hong Kong?
- Positive influence
- Negative influence
- Neutral influence

Appendix 5: Reliabilities for each scale

Scale 1: The new syllabus is relevant to students' lives.
Item-total Statistics

No of Cases = 78   No of Items = 4

	Scale Mean if Item Deleted	Scale Variance if Item Deleted	Corrected Item-Total Correlation	Alpha if Item Deleted
D01	16.7179	8.9584	.6220	.6821
D05	16.7436	8.3750	.6174	.6776
D32	16.5897	8.4529	.6557	.6600
X18	17.0641	8.7101	.4061	.8085

Alpha = .7633

This scale demonstrates internal consistency.

Scale 2: The new syllabus is contextualised.
Item-total Statistics

No of Cases = 77   No of Items = 4

	Scale Mean if Item Deleted	Scale Variance if Item Deleted	Corrected Item-Total Correlation	Alpha if Item Deleted
D10	16.6364	7.4713	.5647	.5594
D16	16.9351	8.4036	.4450	.6355
D28	16.8571	7.8609	.4905	.6064
X25	17.2078	7.2457	.4005	.6796

Alpha = .6852

The scale does not demonstrate internal consistency and alpha cannot be increased to a value above .7 by dropping any of the items. This scale must be dropped from the analysis.

Scale 3: The new syllabus has clear learning targets.
Item-total Statistics

No of Cases = 76   No of Items = 4

	Scale Mean if Item Deleted	Scale Variance if Item Deleted	Corrected Item- Total Correlation	Alpha if Item Deleted
D08	16.3158	6.5123	.6397	.5409
D17	16.2105	7.3151	.5697	.5958
D21	16.1447	7.8321	.5122	.6322
X29	16.6974	6.9872	.3178	.7819

Alpha = .7021

This scale demonstrates internal consistency.

Scale 4: The new syllabus encourages experiential learning.
Item-total Statistics

No of Cases = 78   No of Items = 4

	Scale Mean if Item Deleted	Scale Variance if Item Deleted	Corrected Item- Total Correlation	Alpha if Item Deleted
D02	16.1538	5.8721	.4646	.2645
D15	16.6795	6.6362	.3557	.3693
D22	16.4744	6.0708	.4272	.2998
X35	17.0000	6.3636	.0502	.7192

Alpha = .4881

The scale does not demonstrate internal consistency. However, if item 35 is dropped, alpha is increased to .7192, which is acceptable.

Scale 5: The syllabus is task-based.
Item-total Statistics

No of Cases = 77   No of Items = 4

	Scale Mean if Item Deleted	Scale Variance if Item Deleted	Corrected Item-Total Correlation	Alpha if Item Deleted
D03	16.9481	6.3657	.3789	.4649
D24	17.2078	6.6931	.2685	.5480
D30	16.8312	5.2474	.5881	.2799
X12	17.2727	6.4115	.2007	.6236

Alpha = .5609

The scale does not demonstrate internal consistency and alpha cannot be increased to a value above .7 by dropping any of the items. This scale must be dropped from the analysis.

Scale 6: My textbook is written in line with the new CDC syllabus.
Item-total Statistics

No of Cases = 78   No of Items = 4

	Scale Mean if Item Deleted	Scale Variance if Item Deleted	Corrected Item-Total Correlation	Alpha if Item Deleted
D09	16.1154	8.8566	.7150	.7286
D13	16.1923	8.8067	.7565	.7120
D33	16.0641	9.1257	.6694	.7496
X23	16.7051	8.9898	.4543	.8699

Alpha = .8131

This scale demonstrates internal consistency.

Scale 7: My textbook has helped me to implement the new syllabus.
Item-total Statistics

No of Cases = 76   No of Items = 4

	Scale Mean if Item Deleted	Scale Variance if Item Deleted	Corrected Item-Total Correlation	Alpha if Item Deleted
D04	15.4800	5.2530	.4613	.4118
D20	15.5067	4.6317	.6287	.2653
D34	15.4667	4.9820	.5968	.3120
X11	16.4267	7.2750	-.0539	.8367

Alpha = .5698

The scale does not demonstrate internal consistency. However, if item 11 is dropped, alpha is increased to .8367, which is acceptable.

Scale 8: Publishers have helped me to understand the new syllabus.
Item-total Statistics

No of Cases = 78   No of Items = 4

	Scale Mean if Item Deleted	Scale Variance if Item Deleted	Corrected Item-Total Correlation	Alpha if Item Deleted
D07	14.9872	7.8830	.6032	.4656
D14	15.0000	7.7143	.5425	.4960
D36	14.9359	9.2296	.3553	.6245
X19	15.0385	8.4530	.2708	.7100

Alpha = .6469

The scale does not demonstrate internal consistency. However, if item 19 is dropped, alpha is increased to .71, which is acceptable.

Scale 9: Publishers are knowledgeable about the new syllabus.
Item-total Statistics

No of Cases = 75   No of Items = 4

	Scale Mean if Item Deleted	Scale Variance if Item Deleted	Corrected Item-Total Correlation	Alpha if Item Deleted
D06	16.0133	7.8241	.4564	.5941
D26	16.3333	6.8198	.4250	.6164
D27	16.3467	6.5539	.6567	.4556
X31	16.2267	7.9885	.2912	.7006

Alpha = .6642

The scale does not demonstrate internal consistency. However, if item 31 is dropped, alpha is increased to .7006, which is acceptable.

159

Appendix 6: Total variance explained

Com-ponent	Initial Eigenvalues			Extraction Sums of Squared Loadings			Rotation Sums of Squared Loadings		
	Total	% of Variance	Cumulative %	Total	% of Variance	Cumulative %	Total	% of Variance	Cumulative %
1	11.702	32.506	32.506	11.702	32.506	32.506	5.886	16.351	16.351
2	4.762	13.227	45.733	4.762	13.227	45.733	4.789	13.303	29.654
3	3.152	8.755	54.488	3.152	8.755	54.488	4.746	13.182	42.836
4	1.880	5.223	59.711	1.880	5.223	59.711	3.393	9.426	52.263
5	1.497	4.158	63.869	1.497	4.158	63.869	2.645	7.346	59.609
6	1.279	3.553	67.422	1.279	3.553	67.422	2.577	7.159	66.767
7	1.160	3.223	70.645	1.160	3.223	70.645	1.396	3.878	70.645
8	.984	2.734	73.379						
9	.937	2.602	75.981						
10	.844	2.344	78.325						
11	.699	1.941	80.266						
12	.669	1.857	82.124						
13	.600	1.668	83.792						
14	.566	1.572	85.364						
15	.525	1.458	86.822						
16	.460	1.278	88.100						
17	.441	1.225	89.325						
18	.435	1.207	90.533						
19	.415	1.152	91.684						

20	.377	1.046	92.731						
21	.354	.983	93.714						
22	.268	.744	94.458						
23	.253	.703	95.161						
24	.238	.662	95.823						
25	.227	.631	96.454						
26	.191	.530	96.985						
27	.176	.490	97.475						
28	.170	.473	97.948						
29	.133	.370	98.318						
30	.131	.363	98.681						
31	.120	.333	99.014						
32	.106	.294	99.308						
33	8.898E-02	.247	99.555						
34	7.897E-02	.219	99.774						
35	5.200E-02	.144	99.919						
36	2.920E-02	8.112E-02	100.000						

Appendix 7: Total variance explained (data minus the negatively worded items)

Com Ponent	Initial Eigenvalues			Extraction Sums of Squared Loadings			Rotation Sums of Squared Loadings		
	Total	% of Variance	Cumulative %	Total	% of Variance	Cumulative %	Total	% of Variance	Cumulative %
1	11.157	41.323	41.323	11.157	41.323	41.323	4.777	17.693	17.693
2	2.994	11.090	52.413	2.994	11.090	52.413	4.639	17.180	34.873
3	1.810	6.704	59.118	1.810	6.704	59.118	3.113	11.530	46.403
4	1.372	5.082	64.200	1.372	5.082	64.200	2.661	9.855	56.258
5	1.208	4.474	68.674	1.208	4.474	68.674	2.398	8.880	65.137
6	1.056	3.912	72.586	1.056	3.912	72.586	2.011	7.449	72.586
7	.843	3.121	75.707						
8	.781	2.893	78.600						
9	.645	2.389	80.989						
10	.582	2.154	83.144						
11	.523	1.937	85.081						
12	.470	1.742	86.823						
13	.434	1.608	88.973						
14	.416	1.542	89.973						
15	.362	1.342	91.315						
16	.336	1.245	92.560						
17	.305	1.129	93.690						
18	.281	1.040	94.729						

19	.269	.998	95.727						
20	.209	.844	96.571						
21	.209	.776	97.347						
22	.172	.638	97.984						
23	.152	.563	98.547						
24	.127	.470	99.018						
25	.114	.424	99.742						
26	.081	.300	99.742						
27	.069	.258	100.000						