Learning and Teaching Liberal Studies
Theory and practice

Yvonne Fung, Thomas Tang and Chi-wai Chan
Sample pages
How to develop issues for a theme

Developing issues for a theme involves the following procedures, each of which is discussed below:

- Identifying broad content ideas to be addressed in a theme
- Mapping out possible content ideas and concepts
- Transforming content ideas and concepts into issues for enquiry.

Identifying broad content ideas to be addressed in a theme

In developing issues for a theme, the first step is to identify the broad content ideas encompassed in the theme – which involves bearing in mind the objectives of the specific Area of Study, and examining carefully the ‘questions for enquiry’ and ‘explanatory notes’ in the Guide. In the process, the questions need to be related to the explanatory notes and, since they do not have a one-to-one correspondence, they have to be analysed in a holistic way.

In Table 3.2, Theme 1 ‘Quality of life’ in Module 2 ‘Hong Kong Today’ is used as an example (see pages 27–28 of the Liberal Studies Curriculum and Assessment Guide).

Table 3.2

The main question for the theme ‘Quality of life’ is:

Which directions might be chosen in maintaining and improving Hong Kong residents’ quality of life?

Under this are three associated questions:

What are the different opinions of Hong Kong residents on the priorities which constitute the quality of life?

Which aspects of the quality of life are seen to be more important? Which are seen to be immediate needs? Who might make the decisions? Why?

How can individuals or organisations contribute to the maintenance and improvement of the quality of life? What are the obstacles to their efforts? Which groups of people are most affected if these obstacles are not removed?
After analysing the explanatory notes for these questions, the following broad content ideas are derived for this theme:

- Different conceptions of what constitutes the quality of life held by Hong Kong residents
- Aspects of the quality of life that are considered to be of high priority, and who decides these priorities
- Different criteria used for measuring the quality of life
- Obstacles to and opportunities for maintaining and improving the quality of life
- Ways in which individuals or organizations can contribute to maintaining and improving the quality of life – by overcoming obstacles and/or capitalizing on opportunities
- The consequences of failure to remove the obstacles.

Mapping out possible content ideas and concepts

The next step is to brainstorm possible learning elements – such as concepts, principles, values and beliefs – that can be developed or extended from the broad content ideas identified. This may require revisiting the explanatory notes as the analysis should go beyond their surface meaning and include any knowledge required, but not stated explicitly, in them.

All those involved in teaching the particular module should take part in the brainstorming session. They can start by, for example, listing all the ideas which arise and then, through discussion, perhaps delete some and add others in a process of reiteration. Also, a mind map can be useful for organizing and presenting the content identified. A mind map consists of a diagram with a central idea in the middle and related ideas and key words radiating out from it. It is quite similar to a concept map except that, in mind maps, concepts are not arranged hierarchically from the most general to the most specific. Figure 3.3 shows an example of a mind map for the theme ‘Quality of life’.
Learning through reading

Reading can obviously help students to develop understanding of certain concepts or principles which are needed as background knowledge for enquiry learning; and it also helps them to learn about concepts which arise during the exploration of an issue. Reading is therefore crucial to successful enquiry learning in Liberal Studies and is also in line with one of the four key tasks – ‘Reading to Learn’ – advocated in the curriculum reform in Hong Kong. However, teachers need to help students acquire skills for ‘reading to learn’ and Liberal Studies teachers play an important role in this respect.

Preparing for reading: Ferrell (2007) suggests that, before assigning reading to students, teachers should prepare ‘anticipation guides’ which include:

- pre-reading questions, which have been shown to keep students involved in reading. ‘The questions should range from knowledge-level questions to higher-order questions, such as analysis, if possible’ (p. 33).
- true-false statements to be read by students before reading and checked by them after reading the text by writing ‘T’ or ‘F’ by the side of each. Then, students can review their answers with a partner (pair work) or with their group (group work). This second strategy is cognitively less demanding than the use of pre-reading questions but is useful for students who are less academically motivated or who have little experience of learning through reading.

Another way to help students focus on the key points in a text is to work with them in generating questions and problems they would like to solve (Ebenezer and Connor 1998) so that, when the relevant reading is provided, students will recognize what they should concentrate on while reading.

Note-taking during reading: It is important for Liberal Studies students to develop/improve the techniques involved in taking notes while reading. For this purpose, two suggestions by Ferrell (2007, 34–35) are now introduced.
1 Provide students with a facts/reasons chart, as follows:

<table>
<thead>
<tr>
<th>Facts</th>
<th>Why facts are important</th>
</tr>
</thead>
<tbody>
<tr>
<td>Write the facts from your reading.</td>
<td>Write your thinking about facts.</td>
</tr>
<tr>
<td>Write about confusing ideas.</td>
<td>Explain why.</td>
</tr>
<tr>
<td>Write unknown words.</td>
<td></td>
</tr>
</tbody>
</table>

Students complete the chart as they read the textual materials. However, in using this technique, teachers may have to discuss with students the meaning of ‘confusing ideas’ and reasons why facts are important – so when employing it for the first time, it is useful for the teacher to demonstrate how the chart is to be completed for a short text.

2 The two-column note technique: In this case, the teacher gives a two-column table to students, with some key words/topics in the left column, which helps students to focus on main concepts/ideas in the reading. As students read, they should fill in the right column with information, notes or diagrams.

Take an example from Module 5 ‘Public Health’, in which a teacher is exploring with students an issue related to H1N1 influenza. The aim is for students to gain some basic understanding of this disease through reading texts on the Web (e.g. information from the US Center for Disease Control and Prevention, the World Health Organization and the Department of Health in Hong Kong) before investigating. In this case, the teacher can prepare a worksheet making use of the two-column note technique, as shown on the following page.
questions which are linked to one or more modules. For example, the theme of media could include the following significant researchable topics:

1. The influence of the mass media on personal identity
2. The influence of the mass media on society and culture
3. The portrayal of the quality of life in the mass media.

These topics are related to the following modules:

- Topic 1: Module 1 ‘Personal Development and Interpersonal Relationships’
- Topic 2: Module 2 ‘Hong Kong Today’ and Module 3 ‘Modern China’
- Topic 3: Module 2, Theme 1, ‘Quality of life’.

As a further example, in this case in the area of ‘sports’, the Guide (p. 149) cites the following possible enquiry question: ‘What strategies should Hong Kong adopt to promote life-long participation in physical activities?’ The enquiry study for this project requires background knowledge related to at least three modules, viz.

- The role sport plays in enhancing the self-esteem of adolescents: Module 1, Theme 1, ‘Understanding oneself’
- The relationship between sport and the quality of life: Module 2, Theme 1, ‘Quality of life’
- Sport and social strata (How can the government ensure that low-income families are provided with ample opportunities to participate in sport?): Module 2, Theme 1, ‘Quality of life’
- Sport and a healthy lifestyle: Module 5, Theme 1, ‘Understanding of public health’.

**Teaching and learning in the IES**

According to the Guide (p. 58), the IES should be a teacher-facilitated process and, at the same time, a group learning process. The teacher should help students to become independent in their learning, i.e. not relying on the teacher. Also, the teacher should ‘help students develop connections across subject disciplines’ (p. 58) and promote group learning which includes ‘collaboration and sharing among peers’ (ibid.).
The following table attempts to identify the roles of the teachers and students during the various stages of the IES.

**Table 4.1**

<table>
<thead>
<tr>
<th>Stages</th>
<th>Enquiry study</th>
<th>Peer interaction</th>
<th>Teacher facilitation</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Theme</strong></td>
<td>Choosing a theme that is of interest and worth investigating</td>
<td>Formation of groups working on the same theme; theme clarification</td>
<td>Clarifying ideas in determining a theme</td>
</tr>
<tr>
<td><strong>Title</strong></td>
<td>Determining the project title and questions; and breaking the main questions into sub-questions</td>
<td>Peer evaluation and modification of titles and questions; relating titles and questions within a theme</td>
<td>Providing experience on what are workable titles</td>
</tr>
<tr>
<td><strong>Plan</strong></td>
<td>Drafting a plan of the enquiry process and progress</td>
<td>Peer review and determining cooperative opportunities</td>
<td>Giving guidelines on discipline knowledge useful in the enquiry</td>
</tr>
<tr>
<td><strong>Information search</strong></td>
<td>Locating the relevant information for the project</td>
<td>Sharing the work in searching for information</td>
<td>Resource provision Checking the standard of information</td>
</tr>
<tr>
<td><strong>Data collection</strong></td>
<td>Collecting original data, where necessary</td>
<td>Mutual support</td>
<td></td>
</tr>
<tr>
<td><strong>Multiple perspectives</strong></td>
<td>Exploring alternative perspectives on the issue</td>
<td>Discussing perspectives</td>
<td>Providing existing/established perspectives</td>
</tr>
<tr>
<td><strong>Drawing conclusions (in writing)</strong></td>
<td>Reaching a personal standpoint and conclusion(s)</td>
<td>Feedback</td>
<td>Acting as a sounding-board</td>
</tr>
<tr>
<td><strong>Finalizing the report</strong></td>
<td>Completing a report</td>
<td>Peer review</td>
<td>Establishing criteria for a successful project</td>
</tr>
</tbody>
</table>
If the answers to any of these questions suggest a serious risk to the IES project, teachers should advise students to consider the possibility of revising their titles. Of course, project work cannot be completely risk-free, but students need to assess the risk associated with the types of titles they choose, with advice from both the teachers and their peers. The ultimate goal is for each student to formulate a workable project title.

This issue is illustrated below using two project titles on the themes ‘Mass media’ and ‘Information and communication technology’ – and these are also used later to show other stages in the process.

**Example A**

Jenny is working on the ‘Mass media’ theme. After attending a talk about the adverse effects of the mass media on the values and lifestyles of Hong Kong people, she would like to evaluate whether this claim is true. Her teachers think this is a worthwhile area for an IES.

Figure 4.1 shows a concept map Jenny initially drew to consider the area.

After some reading about the mass media and culture, she makes the following decisions:

1. If all the many different types of mass media are considered, it will be too diffuse and the data collection would require more time than is available. She decides to focus just on popular magazines published locally as she has access to many such magazine at home and in libraries.

2. Jenny also feels anxious about covering different aspects of values and lifestyles. Since the concept of the quality of life has been covered in some Liberal Studies lessons, she considers it better to focus on what Hong Kong people see as ‘a good life’.
Figure 4.1

3 Jenny would like to collect some data on what people actually think about this issue. Also she feels that gathering data on adolescents would be more feasible than trying to sample the whole Hong Kong population. She believes this is justifiable as adolescents are often said to be more easily influenced by the mass media.

4 After further discussion with her teachers and classmates, Jenny decides to include the following aspects in her enquiry:

- How do the popular magazines portray ‘a good life’?
- Have some magazine reports/articles a hidden agenda on what ‘a good life’ is?
- Do adolescents read these articles? Do they see any hidden meanings in some of them?
- What are adolescents’ beliefs about what constitutes ‘a good life’?
Self-assessment and peer assessment

Self-assessment and peer assessment are effective means for developing students’ ownership of their learning and achieving assessment for learning (Leahy et al. 2005). The Guide also encourages the use of these two types of assessment strategy in Liberal Studies.

Self-assessment

The main argument for self-assessment is as follows: it is more likely that students will reach their goals if they can (a) understand them, and (b) assess what they need to do to achieve them and whether they have achieved them. In Liberal Studies, where students need to set learning goals for their enquiry process and design ways to explore an issue, asking them to assess themselves encourages them to check their progress and adjust their enquiry processes when required.

Self-assessment also develops students’ metacognitive skills and increases their motivation (Weeden et al. 2002). In a way, assessing oneself during the learning process helps to improve one’s learning skills, which is an important objective of Liberal Studies. At the start of an enquiry, teachers can develop some criteria for self-assessment with students and then ask them to give a short evaluative reflection at the end of the enquiry process. To assist students to assess themselves, some teachers provide guiding questions and others give a checklist with a scoring rubric. An example of each of these is shown below.

Table 5.2

An example of guiding questions for self-evaluation:

1  Have I chosen the appropriate methods for the investigation?
2  Do I understand all the concepts related to this issue?
3  Did I have enough chances to express my ideas during group work/discussion?
4  Did I express my ideas clearly during group work/discussion?
5  Did I listen carefully to others when they expressed their views?
6  Did I put in sufficient effort and contribute enough to the investigation?
7  What problems have I (or the group) encountered in exploring the question/issue/topic?
8  Have I considered all aspects before making a final decision on my standpoint on this issue (or suggesting a solution to the problem being tackled).
9  What do I need to improve next time?
Table 5.3

An example of a checklist with a scoring rubric for self-evaluation:

The ratings are:
1 = not satisfactory, 2 = satisfactory, 3 = good

Circle the score you give to yourself.

<table>
<thead>
<tr>
<th></th>
<th>1</th>
<th>2</th>
<th>3</th>
</tr>
</thead>
<tbody>
<tr>
<td>• I understood all the concepts related to this issue.</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>• I was able to give viewpoints from different perspectives on this issue.</td>
<td>1</td>
<td>2</td>
<td>3</td>
</tr>
<tr>
<td>• I was able to identify relevant and irrelevant ideas from the websites/reading materials during the investigation.</td>
<td>1</td>
<td>2</td>
<td>3</td>
</tr>
<tr>
<td>• I was able to identify evidence related to the problem/issue being investigated.</td>
<td>1</td>
<td>2</td>
<td>3</td>
</tr>
<tr>
<td>• I was able to draw conclusions/inferences based on evidence.</td>
<td>1</td>
<td>2</td>
<td>3</td>
</tr>
<tr>
<td>• I tried to evaluate the different solutions suggested for solving the problem (or analysing the issue).</td>
<td>1</td>
<td>2</td>
<td>3</td>
</tr>
<tr>
<td>• I shared my ideas during group discussion.</td>
<td>1</td>
<td>2</td>
<td>3</td>
</tr>
<tr>
<td>• I contributed to the group when we explored the issue/problem.</td>
<td>1</td>
<td>2</td>
<td>3</td>
</tr>
<tr>
<td>• My rating of my overall performance in this investigation is:</td>
<td>1</td>
<td>2</td>
<td>3</td>
</tr>
</tbody>
</table>

Peer assessment

Complementing self-assessment is peer assessment. From their research, Black et al. (2003) found that peer assessment is valuable in a number of ways:

• It motivates students to work more carefully.
• Students take more seriously critical comments on their work by classmates than by teachers.
Grading open-ended questions

The written examination for Liberal Studies involves open-ended questions that may elicit a variety of responses. Setting model answers and scoring by the point method is inappropriate for this type of question. Gronlund and Waugh (2009) suggest that an answer to questions of this kind should be graded by ‘judging its quality in terms of a previously determined set of criteria’ (p. 138), with the criteria being dependent on the nature of the question and the learning outcomes to be assessed. In setting marking criteria, teachers first need to determine the levels of quality and characteristics of each level.

In general, the following qualities should be looked for:

- students’ understanding of the questions;
- the content of their answers;
- the approach taken in answering the questions.

For open-ended questions, students’ answers will clearly vary and so if marking guidelines are to be set for use by all teachers at the same class level, descriptive criteria related to content points are preferred. This type of grading method adopts a qualitative model of assessment (see Biggs 1996) in which learning is viewed as a multidimensional process involving qualitative changes in terms of how knowledge and understanding are organized by the learner – not the amount of knowledge gained and understood. When such qualitative criteria are used for marking, there is an element of subjectivity and some may even query its reliability. However, a qualitative approach to assessment is more appropriate for Liberal Studies, given its nature and the expected learning outcomes which encourage the development of individual viewpoints and do not call for fragmented pieces of information. One way of increasing objectivity and reliability is to grade the test/examination question by question, rather than student by student, in order to maintain a more uniform standard in judging the quality of answers. Of course, the reliability will also be increased if two teachers score each question independently.

In marking such qualitative questions, teachers may experience some difficulty in identifying what Gronlund and Waugh (2009) call students’
‘clever bluffing’ (p. 139) – that is where answers which do not deserve a high score have been presented in a way which makes them look very substantial and valid. In such cases, students usually have some knowledge of the issue concerned but have not answered the specific question set. Gronlund and Waugh (ibid.) identify the following common types of bluffing which should be borne in mind when assessing open-ended questions:

- Students just repeat the question in a statement form, usually with some re-paraphrasing, and noting how important the topic is.
- Students just write on the topic covered in the question, but don’t actually answer what was asked.
- Students deliberately include jargon and terms related to the issue but there is no indication that they really understand these basic concepts.
- Students include the beliefs and views of their teachers (which they know from class activities), but they are not relevant to the question.

**Providing feedback**

In the learning process, feedback from teachers is essential to achieve assessment for learning. While public examinations have a summative function, internal tests and examinations can still be formative if teachers provide appropriate feedback through giving comments on students’ answers. In general, comments should not just focus on what is lacking in the work but should also highlight its strengths and, where possible, provide suggestions for improvement.

In marking tests and examinations, teachers should focus their comments on questions such as the following (adapted from Lambert and Lines 2000):

- How well was the answer structured and sequenced?
- How convincing an argument was constructed?
- Was the actual question understood and responded to?
- Did the answer keep to the point?
- Was there sufficient detail/description/analysis?
- How appropriate was the use of language?
• Changes in cultural, economic, political and educational perspectives related to the impact of globalization
• Factors leading to globalization and the interrelationships of such factors with the characteristics of globalization.

From the broad content identified, a mind map is developed (see Figure A.7):

**Figure A.7** A mind map for the theme ‘Globalization’

Radiating out from the ‘Globalization’ mind map are four arms – namely ‘conceptions’, ‘manifestations’, ‘impact’ and ‘contributory factors’ – and a large number of associated concepts/ideas, covering both knowledge and value domains.
Based on the mind map, five questions/issues for enquiry are then raised:

- **How is globalization perceived and what evidence exists to illustrate this phenomenon/process?**

  This question aims to acquaint students with the basic conceptions of globalization and an understanding of its characteristics and the discourses related to it. While it does not meet the criteria of an ‘issue’ (‘something which is in dispute and is often controversial’), the question is important for developing the background content knowledge needed for exploring more controversial issues later. At the end of this learning process, students should be able to recognize the variety of ways in which globalization and the related key concepts are understood. They should also be able to outline the following results of globalization:

  - Because of the breaking of barriers, there is increased mobility, leading to the flow of products, raw materials, services, people and ideas, which results in an increase in international trade, the emergence of multinational corporations and outsourcing.
  
  - There are more opportunities for developing countries to advance, but they face more competition.
  
  - With the increased flow of ideas across nations, the cultural values, beliefs and attitudes of different countries influence each other, probably with those of the developed countries having a greater impact on the developing ones.

- **What causes globalization and how do the factors involved relate to the characteristics of this phenomenon?**

  As with the first question, this one presents an important topic that needs to be dealt with before exploring issues which are more hotly disputed. In examining this question, students will discover the various factors (e.g. movement of people and the development of communication and transportation technology) which contribute to the development of globalization. Teachers should help students to understand the interrelationship of these factors to the perceptions and features of globalization. For example, while the conception of