Self Review

An inquiry into processes used by schools to self review for the purpose of improvement

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Introduction and Purpose

'The primary purpose of this proposal is to research, investigate and consider the various components that make for a successful self review process in an (Area) School. As well as considering the individual components, it would be my intention to investigate and look at various structures by which schools self review them-selves as there appears to be a wide variance in such a process.

A secondary purpose is to implement after Board consideration, a revised process of self review at Amuri that is robust and provides the Board, staff and parents with assurance that the required standards of review are not only being met but exceeded in their delivery'.

This report was in part designed to provide the Board of Trustees at Amuri Area School with a revised process after the 2010 Education Review Office report recommended that the school

- *Extend the understanding of and the guidelines for implementing effective self review*
- *Gather a wider range of good quality evidence to support judgements*
- *Make greater provision in curriculum reviews for evaluating the quality of teaching practices*

However it is also hoped that other schools and in particular Area Schools with their special character (Year 1 – 13) find some use in the material contained in this report. For Area Schools, there are unique challenges in a review process given that they are a mix of primary and secondary styles in a wide variety of areas.

In preparing this report, a variety of schools (primary, secondary, area, private, state) were visited and discussions held, documentation read and observations made. A visit to the local District Council was also made to examine their practices. Extensive reading of a wide variety of publications was also a feature of the preparation – all are acknowledged in the references section at the end.

Thanks to all the staff at these places who made me feel most welcome and were free in their sharing of information useful to my inquiry.

Special thanks to the Amuri Area School Board of Trustees for their very sincere support and to Penny Mossman who acted as Principal for the term along with the staff of Amuri who stepped up while I was on leave.

Background

There is any amount of research and material to provide the rationale for self review and it is not intended to outline this here – the need and worth of self review is assumed. ERO in *'Evaluation at a Glance: What ERO Knows about Effective Schools'* along with presentations by Dr Carol Mutch provide worthwhile information. Afeefa Shakela in her thesis paper *'The Purposes and Processes of Self Review in Schools' (University of Waikato, 2007)* is also worth a read.

Findings

Over the course of the inquiry, a variety of approaches were found to the process of self review and these are outlined here under appropriate headings.

> **Structure**: A variety of structures for review were used and listed here are some of the headings by which schools review. Once each school had identified the areas to review, they then developed criteria, key elements or sub headings under which they reviewed. Frequently these led to a procedure within the school.
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> School A – Curriculum, Employer Responsibility, Documentation and Self Review, Finance and Property Management, Health, Safety and Welfare, Administration (These are the NAG's and were the most commonly used structure for planning and review)
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> School B – Charter, Governance Policy, Operational Policy, Curriculum Statements, Special Topics
>
> School C - Effective Teaching, Safe Inclusive School, Engaging Parents, Whanau and Community, Governance of the School, Leading and Managing the School, Student Learning, Engagement and Achievement
>
> School D - NAG 1 – Student Achievement, NAG 2 – Strategic Planning, Review and Reporting, NAG 3 – Personnel, NAG 4 – Finance and Asset Management, NAG 5 – Safety, NAG 6 - Legislation
>
> School E – Curriculum, Strategic Planning/Documentation, Personnel, Asset Management, Physical and Emotional Health and Safety, Legislative and Regulatory Compliance
>
> School F - Board Administration, Curriculum, Health, Safety and Welfare, Personnel, Finance, Assets
>
> School G - Student Progress and Achievement, Curriculum, Student Welfare, Personnel, Property, Finance
>
> School H – Student Achievement, High Quality Teaching, Professional Leadership, Effective Governance and Management, A positive and safe school, Involvement of parents and whanau

As can be seen there is a degree of similarity between these schools and it should be noted that there were some 'double ups'.

Tools Used: A wide variety of tools were used for review:

1. Surveys/Questionnaires used to cover a wide variety of areas
    a. Bullying
    b. Student Satisfaction
    c. Staff Satisfaction – eg 'Teacher Workplace Survey' - NZCER
    d. Property
    e. School Vision/Values
    f. Teaching Practice
    g. Student Engagement - eg 'Me and My School' – NZCER
    h. Perception Survey – covering curriculum, classroom management, student welfare, property, discipline, co-curricular activities and general school tone
    i. Staff/Student Exit surveys

    The administration of these surveys varied with some schools using those commercially available and others devising their own formats. In the Council process, a commercial business was contracted to conduct regular surveying of clients and findings are incorporated into the reporting process.

2. Curriculum/Department Reviews. There was a wide variety in the presentation of these but all were essentially a reflection of student achievement. Some were done internally by the staff involved while for some, an external 'reviewer', often an HOD from another school would assist. In secondary schools these were more commonly known as HOD/TIC reports and represented a reflection on student achievement and departmental success in meeting annual goals.

3. A common template that identified the key question in the review, outlined how information would be gathered and expected outcomes and then developed a post review action plan that had the following sections:

    • What we learnt
    • Decisions we made and why
    • Recommendations for change
    • How these changes will benefit children and their learning
    • Who will initiate changes
    • The timeframe
    • How we will monitor the impact of the changes

4. NCEA Results Review. These were often completed by the staff of the school (usually the management team) but a number of schools are now using commercially generated analysis offered by various providers eg 'On your Marks'

5. Student Management Systems that provide a data analysis function once certain data is entered eg Classroom Manager that enables analysis of various student achievement data (STAR, asTTLe, Numpa, PAT, Peters Spelling)

6. Material prepared, administered and analysed by the University of Canterbury – Yellis/Satis/Blis. These tests are usually used at Year 9 & 10 level

7. ICAS results for a variety of curriculum areas – Maths, English, Computing, Science, Spelling

8. ERO Assurance Audit. This document provides a comprehensive framework that schools are asked to complete prior to an ERO Review. The framework is used by some schools between reviews as a basis for their own self review in most of the areas described in the structure section

9. Framework for School Reviews (ERO, 2011) that provides a series of evaluative questions that can be used in a review process

10. Evaluation Indicators for Education Reviews in Schools (ERO 2011) that highlight indicators for review

11. The MOE Self Review tools published on TKI that were focussed on National Standards but can be used to review any aspect of schooling

12. Guidance Programmes that are designed to look at students social influences and identify those at risk. The Travellers programme is one such programme

13. Leavers Profiles prepared by the school from which students leave outlining where students go when they leave school

14. An Audit Committee. This model which is predominantly found in business institutions comprising of a number of the company directors was also found in some schools. The role of the committee was to look for proof that the policies and procedures of the school were being followed and report to the Board. This group was called the BOT Policy and Review Committee in one school.

15. External Consultants who would be contracted to conduct a review, usually of a given area eg Health and Safety. There does appear to be a growing group who offer this service to schools and would review curriculum, achievement, property etc

16. Use of a commercially produced programme eg School Docs, EdSol Ltd who provide a full structure for review

17. Cognitive Assessment Test (CAT) used that measures progress over time (used only in Edinburgh as a measure of student progress)

18. Principals/CEO Reports to the BOT/Council. These were a mix of anecdotal and hard data but most frequently reported on progress towards achieving annual goals set in the charter and were produced at regular intervals (In some schools these were also outlined in the schools newsletter)

19. Managing National Assessment review. This process is confined to secondary schools and is a review of the processes used to maintain effective assessment systems ensuring valid internal assessment procedures are in place for national qualifications.

Cycle: ERO have stated there are three types of review:

- Strategic – long term and focussed on key goals relating to the schools vision
- Regular – about business as usual. Smaller, focussed and on-going with the data feeding into the strategic self review
- Emergent – in response to unplanned events or issues that arise

All schools showed evidence of each style of review and a three to five year cycle of review was most evident. Most schools were able to show a format outlining a cycle of review that the BOT had adopted to use.

The stage each school was at was also a factor in review – in my research schools that had been 'in difficulty' saw review predominantly of the emergent type and because of the need to make decisions and promote the school, little consultation with stakeholders was undertaken in much of the decision making. As these schools have grown and shown improvement, there has been an increase in consultation and a planned process for review.

Who: Those who carry out the review processes varied across the institutions visited although there was a clear trend in primary schools for Board members to be more involved in the process than in secondary schools. The culture of the institution seemed to determine who would collect evidence and information and this also varied according to what was being reviewed.

Summary

The following themes emerged:

- There is no one way to conduct self review – the context of the school will determine what works best in any school
- In all institutions visited, it was obvious that each had a long term Strategic Plan (usually 3 – 5 years) and from this an Annual Plan was prepared and

followed. This Annual Plan then provided a framework by which much of the self review could be conducted.
- A structure provided by the National Administration Guidelines (NAG's) was the most commonly used across both primary and secondary schools
- There is a growing emphasis being placed on regular student achievement data as the basis for review
- ERO provide a wealth of resource to assist in the process but it appears that many schools do not use them directly

Conclusions

- Given the difference in schools, each school has to determine its own model for self review but there are a wealth of resources and tools available to assist. The ERO material (Evaluation Indicators for School Reviews' and the "BOT Assurance Statement and Self Audit Checklists') provides a valuable starting point that can be used (and in the view of the author should be)
- The schools charter (strategic plan, vision, values, annual plan) should be the primary basis of self review
- Student achievement should be the focus of review and this needs to be kept at the forefront when reviewing any aspect of the school – how has this process/activity helped our students achieve, can we do it better and if so how
- There is no point in self review simply being a compliance exercise to enable 'boxes to be ticked'. Review and what emerges from it needs to relate to the above two points

References/Presentations used

- Evaluation at a Glance: What ERO knows about effective schools (March 2011)
- ERO: Board Assurance Statement and Self Audit Checklists (Feb 2009)
- The Purposes and Processes of Self Review in Schools (Afeefa Shakeela 2007)
- Reviewing Your School (Edsol)
- Critical School Wide Self Review (Jacqui Duncan 2010 Sabbatical Inquiry)
- NZCER
- Making Self Review work for you; a presentation to Area Schools (Dr Carol Mutch ERO)
- Evaluation Indicators for School Reviews (ERO, 2009)
- Kiwi Leadership for Principals: Principals as Educational Leaders (MOE 2008)
- Effective Measurement of Performance: Get on Board (NZSTA 2007)

Schools visited who provided information/comment

- Amberley Primary School
- Waiau Primary School
- Hanmer Springs Primary School
- Beaconsfield Primary School
- Kaiapoi High School
- Geraldine High School

- Papanui High School
- Christchurch Boys High School
- Cheviot Area School
- Bohally Intermediate
- Hurunui College
- Oxford Area School
- Hurunui District Council
- Yea School (Australia)
- Erskine Stewart's Melville Schools (Edinburgh)

Amuri Self Review

The model used to date at Amuri was that of School G in the structure section and while it details a cyclical process for self review annually at the school, it does not prescribe closely the detail in any of these processes – this means it is relatively useless!

2011 is when the long term strategic plan and charter of the school is reviewed ready for a three year plan 2012 – 2014 to be adopted by the Board. At the time of writing, the Board has approved a process for consultation with parents, staff, students and the wider community to review

- The school's vision
- The school's mission
- The school's values
- Strengths, weaknesses, opportunities and threats

leading to the preparation of a new charter and strategic plan. This will be the first step in the revised process of self review.

The following revised procedure was adopted:

SCHOOL SELF REVIEW

RATIONALE:

Self review at Amuri is a process to assure the Board and wider school community that a quality education is provided to all students enabling every student to reach their personal potential – 'kia kitea toikaka; nothing but the best'.

Self review will be a process to see what we are doing well, where we need to develop and what we should do next.

GUIDELINES:

1. The BOT in the Governance Manual shall establish a time line of review for the various activities and procedures of the school using the 'Six Dimensions of a Successful School' – ERO. These are

   - Student Learning
   - Effective Teaching
   - Engaging Families and Community
   - Leading and Managing
   - Governing
   - Safe and Inclusive School Culture

2. Tools for self review in student achievement (and other appropriate areas) shall be used that enable comparisons to be made with comparable schools

3. Self review shall involve a mix of internal and external review with Property and Finance at least, requiring an annual external input through the school's property consultants and financial advisers.

4. Self review will be evidence based

5. Parents, students and staff will be consulted in review processes wherever appropriate

6. The results of self review shall be factored into the progress towards achieving the schools long term vision, goals and targets and this is the critical role of the Board of Trustees

7. Self review will have as a focus the question 'How effectively does our curriculum promote student learning through engagement, progress and achievement?'

8. The BOT shall consider the Board Assurance Statement resource triennially to assist in the process

9. The school's Annual Plan will use the same structure