

2015 PRIMARY SCHOOL PRINCIPALS' SABBATICAL

REFERENCE NO: I.O. : PPS/7222

NZ CHARTER/PARTNERSHIP SCHOOLS/KURA HOURUA

B M DIVER - PRINCIPAL TAURANGA INTERMEDIATE SCHOOL

BACKGROUND TO CHARTER /PARTNERSHIP/KURA HOURUA SCHOOLS IN NEW ZEALAND

Following the 2011 General Election an agreement between the National Party and the ACT Party allowed for the establishment of Charter Schools in New Zealand. This followed the appointment of Lesley Longstone as the new Secretary of Education who had experience with Charter Schools in the United Kingdom. The Education Amendment Act 2013 set out the legal framework for the establishment of Charter (rebranded - Partnership Schools/Kura Hourua) and was passed into law on 12 June 2013. In essence a Charter school is an alternative to a State school. Charter schools can be operated by private businesses or organisations such as iwi groups/church groups and would be directly accountable for performance to the organisation running them. The Charter schools receive State funding and private donations and have a specific purpose to enable the most disadvantaged students in our schooling system to achieve greater success.

There are several types of schools in the Tomorrow's School model:

- State schools - publicly funded
- State Integrated schools - private schools that have been integrated into the State school system (these schools run like State schools but are able to retain their special characters - caregivers are required to pay "attendance fees" to help maintain the facilities.
- Partnership Schools/Charter Schools/Kura Hourua - mainly publicly funded at a per student ratio well in excess of the per student ratio in a State school. Please note that it is difficult to actually gauge reliable data on actually how much per student Charter schools receive due to the fact that teacher salaries are incorporated into the per student funding formula.

Also we need to note that there has been a move away from the name 'Charter schools' to 'Partnership schools' and I will leave it to readers to interpret for themselves any reason for this.

Suffice to say Partnership schools/Kura Hourua are an additional educational context in the New Zealand education landscape with the purpose to deliver public education in a new way to specifically enable New Zealand most disadvantaged students to achieve greater educational success. Kura Hourua is a metaphor for the partnership of Government, community, sponsors and interested parties in creating strong, flexible schools that are better able to meet their students' and communities needs.

The concept of a Partnership school is embodied in four guiding principles:

- 1 Shift the emphasis of the role of the Government from prescribing inputs to specifying outcomes that must be achieved.
- 2 Ensure that parents and students can choose to attend regardless of background or ability. There must be an emphasis upon attracting priority learners.

- 3 Recognises that school leaders and teachers of quality are critical - an anomaly exists here in that in Partnership schools there is not a requirement for 100% of all staff to have registration as a teacher. H Parata (Minister of Education).
- 4 Partnership schools are expected to have a distinctive ambitious Mission with particular emphasis upon the engaging of disadvantaged students.

Current Partnership/Charter Schools in New Zealand			
School Name	Opened	Context	School Roll as at 31.12.15
1 Middle School - West Auckland	1 February 2015	Yrs 7 - 10	134
2 Pacific Advance Senior School	1 May 2015	Yrs 11- 13	48
3 Te Kapehu Whetu - Teina	1 February 2015	Yrs 0 - 6	43
4 Te Kura Hourua o Whangarei Terenga, Paraoa	1 February 2014	Yrs 9 - 13	74
5 Te Kura Maori o Waatea	1 February 2015	Yrs 1 - 8	38
6 Te Pumanawa o te Wairua previously known as Te Kura hourua ki Whangaruru - to be closed 7.03.16 4 - 8 million spent	1 February 2014	Yrs 9- 14	46
7 The Rise Up Academy	1 February 2014	Yrs 1 - 8	70
8 South Auckland Middle School	1 February 2014	Yrs 7 - 10	121
9 Vanguard Military School	1 February 2014	Yrs 11 - 13	141

HOW ARE PARTNERSHIP/CHARTER SCHOOLS FUNDED

Before any comment on the performance of these schools it is important to find out how they are resourced and whether their resourcing provides any significant advantage in terms of my own context in a new Zealand Intermediate School. Consequently I will outline a simple comparison in order that uninformed readers can make up their own mind.

NZ State Intermediate School Partnership Charter School

Basic Grant per annum	\$3,740 GST Incl	\$145,850
Per student funding	\$996 GST Incl	\$4,671
One off set up Grants school over 500+	Nil	\$697,594

Note that for Partnership Secondary schools the per student rate for a roll above 100 is \$7,046.

Before one jumps to assumptions the per student rate in a Partnership school is based upon the average salary and operational costs for a State Primary school, whereas, the rate in the table above for a State Intermediate is at the operational rate excluding teacher salaries and other components such as property, special education, TFEA etc.

The teaching and operational rates are adjusted annually to reflect inflation with a weighting of 70% Labour Market Index (IMI) and 30% Consumer Price Index in the Partnership context. Similarly in the State school adjustments are made for inflation but on the CPI not the LMI. In 2016 Operation funding for State schools increased by 1%

Under new financial regulations to be implemented in 2017 the Government will provide a minimum level of funding based upon an agreed number of students for the first term after a Partnership school opens. From Term Two onwards the funding will be based upon the actual roll. This change is to incentivise Partnership schools to seek new enrolments.

This is no different from a State school where the more students you have on your roll the more money your school attracts.

ARE CHARTER/PARTNERSHIP SCHOOLS WORKING

It is difficult to form an objective judgment on the basis of a limited number of schools in a short time frame of two years in terms of the focus of "Partnership schools making a difference for Priority Students".

Critics and proponents appear to be diverted in their analysis by vested interest and political/marketing consideration. My comments are based on the ERO and Quarterly reports of the nine schools currently in operation. Some for two years, others for one.

Four of the five Partnership schools have in their first year performed well on the basis of ERO review. South Auckland Middle School and the Vanguard Military School have received favourable reports however the lack of nationally normed data, coupled with evidenced overall teacher judgments does not allow the writer to make any judgment on how Partnership students are performing and achieving compared to similar cohorts (in my case Yrs 7 - 8 Intermediate students) in State schools. It is simply too early and the data is not available.

Common sense tells us that the Government should implement rapidly an evaluation system to make comparative judgments based upon: a) levels of engagement, b) then shift in achievement for individual students. Objective comparative data would then allow the Government to provide evidence of the success of the Partnership context based on quantitative data away from the emotion of 'vested interest'.

Accordingly the New Zealand Ministry of Education contracted Martin Jenkins Ltd to conduct an independent evaluation with the first report due to be published in mid 2015. In reading the report published October 2015 it seems that an opportunity to look at comparative evidenced data in reading, writing and maths has been missed.

The scope and context in the first evaluation is upon innovation within a Partnership School /Kura Hourua. The report concludes that in three Partnership schools/Kura Hourua schools there were clear indications of innovation involving, funding flexibility, governance structures to access specific skills and splitting of the management structures into administration and academic.

Whilst these functions are crucial to the development of any school in any context be it State or Partnership School Kura Hourua schools, the key tasks of any school is to shift learners. The focus of my study is on priority students (those that have been identified as historically not experiencing success in the New Zealand schooling system. These include many Maori and Pasifika students, those from low socio economic backgrounds and students with Special Education needs (ERO August 2012) and their performance in Partnership Schools/Kura Hourua schools.

Unfortunately the Martin Jenkins report does not comment upon the success of PSKH in learning and teaching.

HOW ARE INDIVIDUAL CHARTER SCHOOLS PERFORMING FOR PRIORITY STUDENTS

Taking into account the above ERO statement and the Minister's emphasis upon 'engagement' and 'shifting' achievement of Maori students an attempt has been made to draw conclusions from an in depth analysis of all Partnership School Kura Hourua schools in New Zealand from quarterly reports with the target cohort being Years 7 and 8 and from ERO reports.

1 MIDDLE SCHOOL WEST AUCKLAND (VILLA EDUCATION TRUST)

Note: This Trust operates three schools

- Mt Hobson Middle School and two Partnership schools;
Middle School West Auckland and South Auckland Middle School

Enrolment of priority students (see classification above).

Current Roll 134. 95% of students identify with **at least one** of the priority descriptors.

Assessment

The latest report states that all students have undertaken baseline assessment. The assessment tool used is the P.A.T. test in Reading, Writing and Maths.

There is no reliable evidence available on the shift in achievement that has occurred over the year. Comments are generalised in nature with an example being "with our small classes and project based curriculum (based on the National Curriculum), we are able to take into account each year level and deliver tailored

individual solutions, based on individual assessment and need. We are confident that there will be improvements on this data in coming terms and years". Middle School, West Auckland 1 January - 31 March 2015. There is no detail in data, comparisons with nationally normed data to inform an overall teacher judgment.

Student Engagement

Absenteeism rates in Term One 2015 are stated as 32% absent. This is unusually high or I have misinterpreted their data. Absenteeism rates at my large Intermediate school for the comparative period (Term One 2015), were 5.59%. No stand downs took place and three suspensions occurred. No exclusions were enacted.

There is no commentary to support hard or soft data so it is difficult to gauge actual levels or engagement. No risks or issues were reported upon in terms of priority students and their academic needs. The December 2015 ERO report concluded that students at this school respond well to high levels of expectation.

In summary it appears that this report has an emphasis upon Policy, Procedural, Finance and Business relationships and at this stage I cannot comment due to lack of information on evidenced shift for priority students in Reading, Writing or Maths.

2 PACIFIC ADVANCE SENIOR SCHOOL - OTAHUHU, AUCKLAND

Catering for senior Secondary students which is outside the scope of my inquiry at Year 7 and 8 for priority students in Reading, Writing and Maths. Roll 48 students.

However in an analysis of Baseline assessments it is noteworthy that both qualitative and quantitative data was being gathered around literacy using e-asTTLe and both hard and soft data was utilised to triangulate individual education plans in a co-constructive format with students. This indicates to me that a focus on student achievement based upon sound assessment strategies was evident.

Maths assessment saw a formative approach to testing based upon student needs and 'best next steps'. Unfortunately no data was available on the 'shift' that had taken place.

Student Engagement

Consistent with many of these new schools staff are having major adjustments in learning to handle recognised computer school management tools. Monitoring of attendance has been inconsistent as a consequence however absenteeism has been recorded at 13% not inconsistent with State Secondary school rates.

No stand downs, suspensions or exclusions have taken place.

There appears to be some links between assessment and engagement pedagogy and this in itself is encouraging for the future of the school. Again however no data on 'shift' in achievement is available.

3 TE KAPEHU WHETU - TEINA - WHANGAREI

Years 0 - 6 Roll 43

A wide range of nationally normed assessment tools are used in both English and Maori mediums and are used with anecdotal data to formulate Overall Teacher Judgments. This is encouraging and it indicates that teaching staff are aware of assessment strategies. Baseline data collected is used to inform strategies with Maths being an area of strategic focus. National Standards data is recorded as a total cohort at Year levels and in ethnic groups and this school presents data upon which 'shifts' in achievement are visible. Good summative assessment data is always accompanied by soft data or commentary and this is not evident at this stage.

My analysis of the report indicates that this school is showing signs of 'being on the right track'!

100% of the students at this school identify with at least one of the Priority learner groups.

Engagement data shows no stand downs, suspensions or exclusions.

No attendance/absenteeism data is available. Considerable work has been carried out to keep the whanau informed and engaged including electronic means. This school has been proactive in seeking MOE Special Education assistance, also local iwi agency assistance and hold hui on a term by term basis to report on student achievement. Although this school has some property issues it appears that it is currently meeting the needs of priority students that it cares for.

4 TE KURA HOURUA O WHANGAREI TORENGA PARAPA - WHANGAREI

Years 9 - 13 Roll 74

Limited assessment data is available. E-asTTle is the one assessment tool in place for Reading, Writing and Maths. E-asTTle groups are available for Years 9 and 10. Soft data indicates that the base line assessments are providing staff with a clear picture of where these students are. Again there is no evidence of 'shift in achievement'. No comment on attendance are available and no stand downs, suspensions or exclusions have taken place.

The school recognises a serious risk in its ability to attract capable teaching staff as the roll increases.

This school appears to lack rigorous learning, teaching and assessment structures that can provide evidenced data on how they are 'shifting' priority learners in Reading, Writing and Maths. The roll is increasing on a quarterly basis and currently 100% of enrolled students identify with at least one of the Priority learner groups. All students identify as Maori.

5 TE KURA MAORI O WAATEA - MANGERE, AUCKLAND CITY

Years 1 - 8 Roll 38

A variety of nationally normed assessment tools are used. Whole of school data and class data is available in Maths and Reading. Writing data will be available in Term Two 2015. Assessment comments are generalised with comments such as "there are a variety of needs within the classes". "Some students are yet to be assessed due to absenteeism". Most students are performing well below the National Standard but there is no evidence in either formative or summative testing recording 'shift in achievement'. IEP's are being developed for individual students which is encouraging.

No attendance data is available and no stand downs, suspensions or exclusions have occurred. 100% of students identify with at least one of the Priority group learners.

The kura has wide community engagement strategies in place and communicate via Waatea Radio and is part of a wider community forum called MUMA.

The school has a significant issue based upon business and operational risks due to the current focus of the Tumuaki.

6 TE RUMANAWA O TE WAIRUA - HIKURANGI, NORTHLAND

Student Achievement and Attendance are serious issues for this school.

The school at the time of the writing of this report was under threat of closure due to a performance notice issued by the Minister of Education on 20 February 2015.

7 RISE UP ACADEMY - MANGERE EAST, AUCKLAND

Roll: 70 Years 1 - 8

A variety of nationally normed assessment data tools are in place. Data is available against National Standards and informs us that 60% of students are performing at or above the National Standards in Maths, 73% in Writing and 83% in Reading. These are commendable results as 100% of students identify with at least one of the Priority learner groups.

There is a clear academic focus on student achievement and a coherent and focussed staff professional development programme supported by Ministry of Education SPD contracts (ALiM) are in place.

No stand downs, suspensions or exclusions have occurred.

This school seems to be making good progress so that it is disappointing to note a major threat being financial viability if the roll does not increase.

The ERO report dated 16 February 2015 states:

“A large proportion of these students are Priority learners. The sponsors vision of providing for a Christian based programme based upon the NZ Curriculum to assist Maori and Pasifika students in particular is being adhered to.

ERO concludes that the Rise Up Academy has made a good start, that learners are engaged as are their families and are benefiting from a well structured programme.”

8 SOUTH AUCKLAND MIDDLE SCHOOL - MANUREWA (VILLA EDUCATION TRUST)

Roll 121 Years 7 - 10

This school administered by the Villa Education Trust appears to be moving forward in a positive way with sound learning and teaching, financial management, engagement and governance structures working well. This school comments on shift in achievement which demonstrates an upward trend across all year groups. The ‘shift’ in achievement is attributed to small class sizes and project based learning, similar comment to the middle School (West Auckland), the second partnership school in the Villa Education Trust stable.

This school has good systems to manage absenteeism where the concerns around seven students have been addressed by the school.

No stand downs have occurred, one suspension is recorded and no students have been excluded.

This school, consistent with the other Partnership school on the Villa Trust model has very clear expectations around engagement and behaviour and are part of the values of this school and reports suggest that they are embedded. There is a clear connection between the values of the school and actual practice and a balance between high expectations from the school and students taking responsibility for their own behaviours is commented upon in reports.

96% of the students will identify with at least one of the Priority learner group.

ERO and quarterly reports are positive about this school and its ability to cater for the needs of Priority students. These reports indicate one risk to further development, this being the loss of two key staff. The response to this is mitigated according to reports by staff professional development of existing staff, The most recent ERO report dated 15 October 2014 states:

“That almost all students are Maori or Pasifika from low socio-economic backgrounds. That these students are responding positively in this environment. School curriculum is aligned with the sponsors vision and the New Zealand Curriculum. Engagement and attendance are positive and students talk in a positive manner about their experiences at this school.

This school is reporting to parents in regard to National Standards.

The school will be reviewed again in one year.

CONCLUSIONS

This has been an attempt at looking at Partnership schools in New Zealand and their progress in enhancing the learning and achievement (shift) of their students. In addition there has been a focus upon the delivery to ‘Priority students’ as defined by ERO. The opinions expressed are those of the writer in his interpretation of data available to date.

As at 25 November 2015 in the third round of applications for Partnership schools, 26 proposals have been put forward. Currently New Zealand has nine such schools with one on final warning of closure. The 26 submissions come from across the Country with

10 from Auckland
2 from the Bay of Plenty
2 from Gisborne
2 from Hawkes Bay
3 from Waikato
1 from the Manawatu
4 from Wellington
1 from Christchurch,

covering the age levels from Year 0 to Year 13.

My conclusions are based upon data available from current Partnership schools quarterly reports and ERO findings.

The debate around the merit of partnership schools and a comparison with school achievement in State schools is not valid due to the paucity of achievement data from Partnership schools. It is simply too early to make comparisons and the Minister’s independent report by Martin Jenkins and Associates has no plans to draw comparisons at this stage.

External agencies have to date focussed their assessments on assurance criteria rather than learning and teaching self review and how well schools are shifting Priority students.

The argument is that Partnership schools should be given the opportunity and time to get organised in terms of their accountability to their sponsors, finance, governance and property provision.

In terms of assurance audits eight of the nine Partnership schools are meeting their requirements after one/two years with the exemption of one under threat of closure.

It appears that economies of scale assist the other eight schools in their overall performance. The larger the roll the better chance of financial viability and consequent success.

Some schools are facing the challenge of governance and the interface between sponsors vision, governance and management and it is crucial that those schools obtain external professional help quickly. The Villa Education Trust that currently overviews three schools (two Partnership schools) has a current model that it has adapted from its first school successfully into its two Partnership schools. In this model economies of scale are evident and financial management, governance and management are robust.

In some schools there appears to be a disjoint between vision and practical outcomes and it is essential that personal agendas do not take precedence over the strategic vision of providing Priority students previously disengaged in their previous school, the opportunity for academic success.

There is no doubt that on the basis of reports that partnership schools are providing an alternative to the State system which is engaging previously disengaged students the majority of whom are priority students. Whether they are providing a 'better' education than State schools is a moot point. One can only say at this point that they provide an alternative.

The paucity of learning and teaching assessment data demonstrating 'shift' as a generalised statement across all Partnership schools is disappointing.

It is incumbent upon Partnership schools therefore to very quickly implement assessment policies inclusive of both formative and summative data upon which teachers, students and whanau can utilise next learning steps.

This currently in my opinion is the challenge for Partnership schools. Showing credible teaching and learning programmes in Reading, Writing and Maths is their biggest challenge.

New Zealand has a world class education system and a world class curriculum. We pride ourselves on providing students and their caregivers with choice. Partnership schools are a context of choice for some and we should welcome this diversity. Regardless of the difference in funding between Partnership and State schools, the difference in political agendas and the difference in values, Partnership schools should be a welcome addition

to the New Zealand Education Context on the proviso that they prove with authenticated evidence nationally normed data and evidenced overall teacher judgments, that they are 'shifting' Priority students in Reading, Writing and Maths. This is the same measuring stick applied to all other New Zealand educational contexts.

Five years should be enough to draw an evidenced comparison on the Government's policy intent "that PSKH have clear outcome focussed accountabilities that will enable them to attract students who have previously not been well served by the Education system". This policy intent misses the key criteria. It should include a statement about "evidenced shift in achievement" in Reading, Writing and Maths.

B M DIVER

- References:
- * Latest ERO reports for nine new Zealand Partnership schools.
 - * Nine Partnership schools Annual and Quarterly reports to 31.03.15.
 - * Networkkonnet. Kelvin Smythe, Developmental Publications, Charter Schools are.... 2014
 - * Education Amendment Bill 2013
 - * Tomorrows Schools Today - Adams Mark , 2009
 - * Martin Jenkins & Associates - Report to the Minister of Education 2015
 - * Charter Schools - Funding Formulas - PSKH
 - * The Politics of Charter Schools - Liz Gordon
 - * Charter Schools - One year In - Are they working and for whom? 2015 Education Review - Jude Barback
 - * Charter Schools - Accountabilities - PSKH
 - * Charter Schools - How are they performing PSKH