Principal Sabbatical Report 2009

The School Charter: Planning and Reporting

Murray Cain – Ranzau School
31 August – 20 November 2009

Acknowledgements

I wish to acknowledge and thank the following schools for giving me the opportunity to visit them to discuss planning and reporting. I also thank my Principal colleagues for the opportunity to have professional conversations in a wide range of matters related to education and also in giving me the opportunity to have a general look around their schools. Both of these activities are valuable supplementary learning experience gained as a result of this sabbatical.

Otago schools
- Outram School
- Mornington School
- Green Island School
- Kaikorai School

Canterbury Schools
- Marshland School
- Isleworth School
- West Spreydon School
- Avonhead School

Marlborough Schools
- Witherlea School
- Riverlands School
- Renwick School

Buller Schools
- Westport South School
- Reefton Area School

Nelson Schools

- Wakefield School
- Richmond Primary School
- Nayland Primary
- Henley School

I also acknowledge and thank the Board of Trustees and staff of Ranzau School for giving me the opportunity to have this sabbatical. Absence from a school invariably involves a degree of disruption, but the benefits of a sabbatical more than compensate, a view recognised by the team at Ranzau.

Purpose

School Charters became mandatory in 2002. Tim Mahon, at that time Project Manager for the Schools Planning and Reporting Project in his National Assessment Regional Seminars stated "the new legislation firmly places planning for, and reporting on, improved student achievement at the top of the school's agenda."

This report aims to explore the extent to which Planning and Reporting has assisted schools in improving outcomes for students and to consider ways that it could become more effective tool.

The questions I sought answers to included:

- How well have schools embraced the planning and reporting model?
- To what extent has planning and reporting impacted on student achievement? How do schools know this?
- What can be done to improve the way we do our planning and reporting?
- Are their differences for small and large schools?
- Are there models for planning and reporting that seem to be more effective than others?
- What are some practical tips I can use and share with other schools to help make planning and reporting more relevant

Background

During the roll out phase of the Planning and Reporting in 2002, I was seconded to the Leadership and Management team at the Christchurch College of Education (now The University of Canterbury) to work with schools to introduce the requirements of planning and reporting in the Nelson, Marlborough and Buller regions.

I have also worked as a School Development Officer secondee at Ministry of Education Nelson Office in 2005 and this work included evaluating the extent to which charters submitted from schools in the Marlborough, Nelson and West Coast regions were meeting the requirements of the legislation. In 2008 and 2009 I have been employed on a casual basis by the Ministry of Education to assist the local School Development Officer with charter approvals during times when high numbers were being submitted.

Finally, as Principal of Ranzau School, I have strived to develop a charter / planning and reporting model that is a living school document and one that contributes to raising student achievement as opposed to just developing a model with the primary purpose of compliance.

With this background, I was keen to look at the extent to which planning and reporting was meeting the needs of schools in terms of raising student achievement through targeted curriculum focus.

Gathering the data

Schools throughout the South Island were visited to allow for a good cross section of views on planning and reporting. During the school visit, the Principal was interviewed around a key set of questions and depending upon responses given, follow up questions were asked.

Schools were selected quite randomly although an attempt was made to ensure that schools of a range of sizes, decile rankings and rural verses urban were visited.

The following questions formed the basis of the interview.

- What is your attitude towards planning and reporting?
- How much emphasis do you place on the various components? Vision, strategic, annual, targets
- What does your model of planning and reporting look like?
- Have you refined you model of planning and reporting so that it is more effective?
- If yes, explain
- How do you choose your targets?
- Do you think planning and reporting should be externally monitored?
- If yes, by who?
- To what extent do you think planning and reporting has impacted on student achievement? How do you know this?
- What do you think can be one to improve our planning and reporting process at a systems level? (Not at a school level)

Findings

In general terms, schools were very positive about the benefits of being strategic with regard to school development and in particular, student achievement. During the period since the legislated introduction of planning and reporting, there has clearly been a maturing in thinking around the benefits and thus a trend away from mere compliance to a better understanding of the benefits. The approach to target setting is now tending to be more specific but there is still concern about the external demands of specific, valid and reliable data required to measure outcomes. Compliance requirements of planning and reporting are still of considerable concern to schools.

When looking at specific aspects of planning and reporting, the following findings were significant.

(i)   School Visions. *"Our vision is the centre of everything – it took us 2 – 3 years to get to that."* Schools that had worked hardest in this area, to create a school vision that was understood by all, shared by everyone and was closely linked to the life of the school, felt very strongly about the value and importance of this fundamental over arching statement. Good examples were observed where schools could clearly articulate their vision and priorities and sitting beneath this, their medium and short-term goals were directly linked. This gave schools strong justification for their curriculum.

(ii)   Strategic planning. *Our strategic plan fully drives us. It gives us our own view of the world which is visible to all."* Schools believe that they way they do strategic planning has improved since the introduction of the legislation and schools are reporting that the positive impact it is having on the day to day life of the school is increasing. Strategic planning is becoming more

focused for example in some schools, strategic planning was initially a smorgasboard of things the school hoped to achieve / focus on over the next three to five years whereas now it may include a plan of what is to be done next year, in two years and so on as well as some detail about who and how and what.

(iii) Student achievement targets. *"Target setting has focused teaching. This is good because unless teaching changes, learning won't change."* Principal's were generally very positive about the broad concept of target setting. The positives included acknowledgement that to focus on identified needs is important, targeting resources (financial, human and physical) supported raising student achievement and targets provided a great opportunity to communicate student achievement progress to the Board of Trustees and the school community. Furthermore, schools were now beginning to be more focused with target setting. Rather than having a reading target across the whole school, now they may target a cohort or even students achieving at a particular level (stanine 4 for example). The greatest concerns with regard to target setting were generally related to the compliance aspects of planning and reporting. See item (iv)

(iv) Targets, the M.O.E. and .E.R.O. *Sometimes its difficult to be honest. Data may be skewed and there may be good reason for this but its difficult to explain on paper so its easier to leave it all out"* The issue of target setting concerned many schools in relation to the requirements to send them to the Ministry of Education and to the advice given by E.R.O regarding target setting. These issues included…
- Some schools furnish the M.O.E with only one target despite the fact that they may in fact be working on several. They would pick the target that was easiest to provide evidence / data and by doing this they were meeting compliance requirements.
- Many schools expressed concern about the need to provide valid and reliable data. This often resulted in "dumming down" the target in order to find data or in some cases, modifying the target to fit the data.
- E.R.O. frequently insisted that schools should always be targeting literacy and numeracy. Schools felt that this was limiting and in some situations, a target in these areas was not a priority for the school. Such advice is contrary to self management.
- E.R.O.'s insistence on nationally referenced data was also problematic for some. Again, schools found this limiting, often resulting in the school not focusing on areas of greatest identified need
- Schools were consistently unsure about why charters had to be submitted to the Ministry of Education. They postulated that the M.O.E did nothing with them that was useful and in cases when feedback was requested, it wasn't forthcoming.
- Some schools felt that some E.R.O. personnel had little or no experience with planning and reporting which put into question there ability to provide useful feedback to schools.

(v) Submitting Charters Annually. *"The M.O.E ask to see it. I don't know what they do with it. It's compliance."* This was issue was without doubt the

biggest single issue with the Principals in this survey. The view was widespread and predominant that the to submit annual charters to the Ministry of Education was compliance without purpose. Details of the issues here are reflected in the comments outlined in section (iv) above.

(vi) Selecting Student Achievement Targets. *"we select our targets from student achievement data. We have done a lot of work recently developing student tracking."* It is evident that schools have made significant progress in recent years to develop effective tracking of student achievement and this has played a significant role in providing a platform for the selection of development targets. Schools however don't want to be totally constrained by this because there is a view that alternative options exist. These include:
- Teacher's subjective professional judgements
- Gut feeling later supported by evidence
- Linking to national priorities
- Development contracts available to schools eg literacy
- Continuation of previous targets because of inadequate progress

One school reported that they select targets that are easy to report on. This simplifies compliance. The school does look at more complex student achievement issues but chooses not to report on these. Several schools indicated they included just one target in there submission to the Ministry of Education in order to satisfy the compliance requirement whereas in reality, they focused on other identified areas as well.

Schools planning and reporting has developed positively since the introduction of the legislation and generally, principals would acknowledge that it has had a positive impact on student achievement.

Of greatest significance in this respect is the focused development. Target setting highlights the awareness of staff leading to improved classroom practice and data provides feedback on progress and effectiveness.

Planning and reporting is also seen as an excellent medium on which to provide the B.O.T. and community tangible feedback on school improvement in relayion to student achievement.

Schools are progressing the way they link planning and reporting to alignment with the new curriculum. This is particularly relevant in relation to the key competencies.

School self review is gaining in focus. This is currently being supported by E.R.O. Schools feel positive about the role of effective self review in providing a basis on which to strengthen strategic planning.

The way that schools set out there charters is variable within the constraints of the legislation. There is a clear trend to simplify charters, make them more meaningful, readable and purposeful.

Some schools link teacher appraisal to student achievement targets. The belief here is that if a particular target is a focus of school development, then it is logical that it should also be a focus of teacher development.

Summary

It is clear that schools in general have embraced planning and reporting. They see value in a focused approach to school development and planning and reporting has assisted in this process.

Schools are opposed to the compliance requirement to annually submit charters and targets reports to the Ministry of Education. They see little point in this, are skeptical about what the reason is and find feedback if they get any of little or no value.

E.R.O. is seen as the appropriate agency to monitor planning and reporting (just as they do with other compliance matters). There is however some concern about the skills and experience of some E.R.O. personnel to do this effectively.

Schools like setting student achievement targets. They find these helpful. Sometimes, schools are frustrated by factors that limit their ability to be truly self managing in target setting. These include the insistence of literacy and / or numeracy targets by E.R.O., the constraints created by the insistence of nationally referenced data, and the requirement to keep it simple so as to make reporting to the M.O.E. easier and more understandable.

References

Schools Planning and Reporting – 'Evidence to Action', Tim Mahon, M.O.E. 2002

Planning and Reporting – Frquently Asked Questions, M.O.E. 2005

Education Standards Act 2110, Sections 61 – 63B