



## **PRIMARY PRINCIPALS' SABBATICAL LEAVE**

### **Term 3 2007**

#### **PROPOSAL**

The reason for my application for sabbatical leave was based on;

1. Timing in my professional career as a Principal, and
2. Fenwick School – six years on from amalgamation in 2001.

Starting as a Teaching Principal at a small two teacher country school in 1982, I have since been Principal at three further schools – two as teaching Principal and more recently as walking Principal at Fenwick Primary since 2001.

Over my twenty-four years as Principal, I have been active in professional development and in keeping in touch with teaching and principalship through conferences, a mentor group and our North Otago and Otago Principals' Associations. During this time I have not had a period of leave for study or sabbatical purposes and valued the opportunity to use the term as an opportunity to read, discuss, report, reflect and set goals for the next phase of my principalship.

Several crucial elements have stood out as most important in creating and developing our school and it is these areas of leadership, the development of curriculum and programmes, school culture and the community I studied further during the sabbatical leave. This included some study time and visiting other schools to interview Principals, Boards of Trustees, and students both locally and in other South island areas.

# **SABBATICAL STUDY – LLOYD BOKSER**

## **PURPOSE:**

- To visit a variety of schools that have experienced E.D.I.'s.
- To interview Principals', Board representatives and students.
- To focus on crucial factors of leadership, curriculum and programme, school culture and community that shape and influence the successes and shortfalls. involved in the amalgamation of schools.
- To answer the question: "Do E.D.I.'s achieve what the Ministry of Education believe they should?"

## **METHOD**

1. Contact a selection of amalgamated schools from South Canterbury, North Otago, Taieri and Invercargill from a range of sizes and deciles.
2. Ring the schools and follow-up with a letter of introduction, key questions and visit time(s).
3. Visit schools and interview key players.
4. Collate information and write up findings.
5. Share findings with interested school's and Fenwick Board of Trustees and staff.

## **TIME FRAME**

- Initial schools contact (Week10, Term 2, 2007).
- Letter to participating schools (Week 10, Term 2, 2007).
- Interview with participating schools (Weeks 2 & 3, Term 3, 2007)
- Writing up of information (Week 4, Term 3, 2007)
- Sharing of findings (T4 2007)

## **E.D.I.'S - KEY QUESTIONS**

### **PRINCIPAL / BOARD OF TRUSTEES CHAIRPERSON.**

1. What were the key reasons an E.D.I. was introduced? (e.g. was it MOE, community instigated?)
2. Were you given appropriate and useful information, guidance, assistance, support, consultation throughout the process?
3. Was appropriate resourcing provided ( people/money/property etc) and a realistic time-frame applied?
4. What are the major successes and achievements during and since your amalgamation ( leadership, school culture, community, curriculum and programmes).
5. What have been the main draw-backs, pit falls, shortcomings and frustrations experienced as part the process or result of the process?
6. Do you believe the aims of the E.D.I. have been achieved / met? (Why, why not?)
7. What are your future priorities, goals for your school's development?
8. Do you have any comments or suggestions, advice, to give to the Ministry?

### **STUDENTS ( General questions ) eg:**

1. What are the good things about your new school?
2. What makes your school special?
3. Are there any things you would like to be different or change?

## **FINDINGS:**

*What were the key reasons an E.D.I. was introduced?*

Most EDI's followed a Ministry Network review of the area with population and school number trends preceding the EDI process. None of the schools in the North Otago, South Canterbury, Invercargill or Taieri districts had instigated a review or amalgamation, but a recapitation application in one area did prompt a Ministry investigation into Year 7/8 education.

- The decision by the Minister to effectively eliminate intermediate schools in some areas was seen as a Ministers agenda and not based on sound educational reasoning.
- Some schools viewed the EDI as having little to do with better provision of educational opportunities, rather to do with dollars and cents or to boost local High School numbers.

*Were you given appropriate and useful information, guidance, assistance, support, consultation throughout the process?*

- Very little guidance or information leading up to the EDI's was provided by the Ministry – often only attended progress meetings or reference groups meetings and provided a neutral perspective on a subject which became very parochial. Unfortunately the decisions made by communities and schools were often not followed by the Ministry/Minister.
- Some areas found their Change Case Manager had several mergers to handle and were over loaded, often appointed late in the process to address problems rather than lead the amalgamation.
- Pressure from the Press or Solicitors was often the only way the process became more transparent.
- NZEI generally not pro-active. Some large scale industrial issues that needed major resourcing and addressing.

*Was appropriate resourcing provided (people/money/property) and a realistic time-frame applied?*

- A lot of Ministry of Education dollars were ploughed into schools. Resourcing generally tagged for property or pupil achievement / enhancement
- Funding based on pupil numbers (per head basis) moving to the new site rather than on real needs especially property up-grading and staffing requirements.
- Enhancement funding was hard to access and highly accountable (major paper work for even small amounts).

- Unrealistic time-frames for planning, appointments, property development, programmes etc – very stressful for schools and communities.
- Little understanding of the immensity of the task of establishing a ‘new’ school.

*What are the major successes and achievements during and since your amalgamation (leadership, school culture, community, curriculum and programmes)?*

- Literacy contract – learning media contract (cluster)
- I.C.T. Contract - instigated positive changes to teaching and learning.
- Digital classroom
- Inquiry Learning developments.
- Oscar programme operating from school
- Values programme
- Strong Board skills and commitment ( and Combined Boards).
- Community culture development
- Project developments. New buildings.
- New programme initiatives.
- Pupils – accepting and positive.
- Staff commitment and loyalty to “make it work”
- Staff relations improving and developing as the new school evolved.

*What have been the main draw-backs, pit falls, shortcomings and frustrations experienced as part of the process or result of the process?*

- Lack of Ministry of Education assistance, particularly for Principals.
- As an integrated school – more benefits than drawbacks – but Year 7/8’s not getting a better deal at the local college after decapitation
- Whole area networking by Ministry a major mistake
- ERO Review of schools after 18 months was not helpful.
- Timeframes were too tight.
  - Building disruptions /unavailability of tradesmen/property issues on-going.
  - Appointments were rushed – loss of experienced teachers.
  - Sheer scale of closing schools and setting up of new school
  - Community issues.
  - Restrictions and slow release of funding.

*What are your future priorities , goals for your school’s development?*

Future priorities for school’s generally centred around relationship building and curriculum development and delivery to provide the best deal for students and communities. In all cases the dedication, commitment and skill of school Principals was the key factor particularly when every case was different and there is still no “manual” to refer to. Tackling the task of an E.D.I. is an experience to test any school and its community and not one to recommend.

An interesting part of the process is the effect on students. Some schools I visited had surveyed a sample of their pupils while in others I just talked informally with groups. In all cases pupils were positive and acknowledged the efforts of staff and parents. School spirit was positive and most saw advantages, not wanting to return to their old school. This adaption by pupils to change is a credit to the schools and the many ways they had created a fresh start – school culture building, new name, uniform, acknowledging community traditions, special events, new facilities, fostering home and school relations etc.

*Do you believe in the aims of the E.D.I. were met and do you have any comments or suggestions, advice, to give to the Ministry?*

- Should be community lead not Ministry of Education driven – remember mergers mean closures!
- Resourcing and information was poor (M.O.E., NZEI, Advisers etc).
- Whole area EDI's were a disaster and satellite schools don't work!
- Often EDI's for the wrong reasons e.g State reviews on Intermediate's, or boosting High School rolls.
- A lot of wrongly directed resourcing (\$) based on per head basis rather than real needs (eg buildings and property, teaching, transport, resources).
- Often consultants/facilitators/advisers/consultation not followed – over-ridden by Minister of Education.
- ERO visits within 18 months of amalgamations are counter productive – serve no purpose except extra stress.
- Lack of “self governance” of EDI funding frustrating and highly accountable. Also delays etc cause community issues.
- The reason EDI's have worked is purely due to the dedication, and commitment of Principals, staff, Boards of Trustee's and communities.

#### **ACKNOWLEDGEMENTS**

A sabbatical after 32 years teaching, 27 as Principal, was a tremendous opportunity to visit schools, discuss common issues, reflect on my leadership and inject new enthusiasm into my Principalship at Fenwick Primary School.

I would like to thank the Ministry of Education Sabbatical Leave Scheme and the Fenwick School Board of Trustees for supporting my application for leave. Thanks also to the schools who willingly hosted me and shared their time and ideas with me.

Lloyd Bokser  
Principal Fenwick Primary School