



Step Change: Success the only Option

Report of the Inter-Party Working Group for School Choice



A report on policy options relating to the funding and learning provision of schools that will increase parental choice and focus on successful student achievement in New Zealand.

Acknowledgements

In the course of its work, the Inter-Party Working Group (IPWG) visited a number of schools and heard from a diverse range of educationalists, to whom the IPWG offers its thanks.

Christchurch Boys' High School

The New Zealand Graduate School of Education

Macleans College

Glen Taylor Primary School

Te Kura Kaupapa Māori o Te Waiū o Ngāti Porou

Tolaga Bay Area School

TŪ TOA Charitable Trust

The Correspondence School



P.O. Box 18888
Parliament Buildings
Wellington

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The Report of the Inter-Party Working Group, *Step Change: Success the Only Option*, fulfils the commitment made in the National-ACT Confidence and Supply Agreement relating to school choice.

Context

In November 2008 a minority National government was elected. It enjoys no formal coalitions, but has Confidence and Supply Agreements with ACT New Zealand, the Māori Party, and United Future.

The National-ACT Confidence and Supply Agreement committed to “work, over time, to increase the education choices available to parents and pupils so families have more freedom to select schooling options that best meet the individual needs of their children.”¹

The National-ACT Confidence and Supply Agreement further provided, inter alia, for a “report on policy options relating to the funding and regulation of schools that will increase parental choice and school autonomy.”²

An Inter Party Working Group (IPWG) of National, ACT and Maori Party MPs, under the chair of Hon Heather Roy, was established in April 2009.

The objective of the IPWG was to contribute to the improvement of the education system as a whole and thus to better educational outcomes.

The terms of reference for the IPWG were to:

- Review school funding and examine options that will reduce central control and treat all schools on a more equal basis according to enrolments;
- Consider whether funding mechanisms should include alternative arrangements for special factors (eg transport, special needs) and decile funding, and for additional fees;
- Review enrolment scheme policy and other regulations which may limit parental choice and the ability of schools to respond to parental demand;
- Examine the concept of trust schools and other models which might facilitate greater self-management and innovation, and the registration and accountability mechanisms for such schools that might accompany the relaxation of detailed controls;
- Consider the interface elements of the education system such as Māori education, school property, school transport, special education and the Correspondence School with a more choice-oriented system; and,
- Review policies in other countries, in particular Australia, Sweden, the Netherlands and Ireland, for lessons that may be relevant to the Working Group’s task.

Background

The policy context of the current education system developed in response to the Education Act 1989 and to the *Tomorrow’s Schools* reforms of the 1990s. Four principles guided policy during this period: parental voice, parental choice, the delegation of power to schools, and new contractual arrangements between government, schools and parents. Policy focused on school governance with community and parent involvement, rezoning to assist parental choice, school autonomy, and a fully funded option for financing schools (weighted per capita funding taking into account students’ socio-economic status).

From 1998 and 2000, changes in policy and legislation reversed the impetus of *Tomorrow’s Schools’* policy. It removed the fully funded option from schools, reintroduced school zones, and capped rolls. Schools also became less flexible on contractual and remuneration arrangements with staff.

Schools are presently managed through “a network of state schools.”³ They receive decile weighted per capita funding for operations. Teacher salaries are negotiated through a collective bargaining agreement.

Tomorrow’s Schools also set in motion the development of a national curriculum. The national curriculum has been written and refined over the last 16 years, and places emphasis on competencies and skills rather than a canon of knowledge.

In relation to the national curriculum, the National Certificate of Educational Attainment (NCEA) has likewise been developed and refined. The NCEA is offered by all state and state-integrated schools, but does not preclude other (international) examinations being offered.

State of education in New Zealand

In terms of literacy, New Zealand students generally do well within the current school environment. "International comparisons confirm that the achievement of some New Zealand students is among the best in the world. For example, of the 57 countries that participated in PISA 2006, only two performed better than New Zealand overall. Only three countries had a significantly higher mean reading literacy performance and only five recorded a significantly higher mean mathematical literacy score."⁴ The proportion of school leavers achieving NCEA Level 2 or above has increased by 24 percentage points over the last five years. In 2007, 66 percent of New Zealand students achieved at least a Level 2 qualification.⁵

The system continues to underperform for a significant minority of students

Despite some positive signs, performance at NCEA is still mixed. A third of New Zealand school leavers fail to gain NCEA Level 2 or higher.⁶ Critical to note is that this failing 33 percent are found within and across all state and state-integrated schools, indicating a systemic problem. In other words, the failure cannot be attributed as a problem of low-decile schools. Those students who leave school without formal qualifications lack the capacity to read, write or perform arithmetic at the level required in a modern society.

Of serious concern is the proportion of Māori (56 percent) who did not gain NCEA Level 1 or above (2007)⁷ and "the 22 percent who left school without formal attainment in 2006."⁸ Only "37 percent of Pasifika year 11 students gained an NCEA qualification."⁹ 60 percent of Māori students and 56 percent of Pasifika students met the literacy and numeracy requirements of the most basic level of NCEA, in contrast to 76 percent of Asian students and 79 percent of New Zealand European/Pakeha students.¹⁰ Only 37 percent of year 13 Māori students gained NCEA Level 3 or above.¹¹ "The 2006 PISA report recorded that the mean score of Māori students (477) and Pasifika students (461) was weak compared to the OECD mean (492). The mean score of European/Pakeha students was 542."¹²

With reference to New Zealand's gifted and talented students the Education Review Office (ERO) has found that provision is highly responsive and appropriate in only one in five schools, with 58 percent of schools, programmes and provisions being either somewhat or not appropriate and responsive.¹³

Stand-down, exclusion and expulsion rates for students are also high in the current school setting. In 2007, the age-standardised stand-down rate for Māori students (55.3 per 1000) was 1.5 percent higher than Pasifika students and 2.6 times higher than New Zealand European/Pakeha students. The age-standardised expulsion rate for Māori students (3.5 per 1000) was lower than the rate for Pasifika (4.1 per 1000) and higher than New Zealand European/Pakeha students (1.3 per 1000).¹⁴ Rates of truancy from 2006 indicate that 4.1 percent of students (29,000) are truant for all or part of each school day.¹⁵

Educational failure is not an isolated problem. Because of the close relationship between education and health, education and democratic engagement, and education and employment, educational failure lays the foundation for a raft of other social problems. Unemployment is highest among those who have no school qualifications. There is a strong link between failure at school and offending rates, too - 80 percent of those who appear in the Youth Court are not attending school.¹⁶ A recent McKinsey report found that educational underachievement of the magnitude found in New Zealand carries the effect of a permanent economic recession.¹⁷

Introduction

The IPWG notes that better educational outcomes are possible for every student, but has chosen those most in need for the focus of this report. It recognises those most in need as the roughly 20 percent who are not only failing but are continuing to fall ever further behind in the current system, along with the top 5 percent of students, who are gifted and talented.

The IPWG recommends an initiative directed at effecting measurably improved outcomes for the 20 and 5 percent that bookend the current continuum of student achievement with the view that this initiative can be applied, over time, to the system as a whole.

The principles that underpin this report are choice, flexibility, quality and accountability:

- choice for students to develop a personal learning plan and for them to choose a learning provider who will meet their needs, interests and goals
- flexibility for providers to expand and find staff, curricula and pedagogies that match student needs
- quality that is reflected in school leadership, teaching, content and student performance outcomes
- accountability that sees providers measured by outcomes pertaining to student success and satisfaction.

The international experience

The IPWG notes there are several policy initiatives overseas, stemming back to the late 1990s, which offer models from which New Zealand can draw opportunities for improvement.

Sweden's free schools

For example, Sweden has a rapidly expanding free-school sector supported by neutral funding which gives students in failing schools access to their school of choice. America has a growing charter school movement that likewise addresses the worst educational failure in school districts, and the UK has an expanding number of academies that were implemented in an attempt to tackle the worst educational problems in local education authorities. These sorts of initiatives aimed at lifting student achievement, particularly among the lowest quartile, are increasingly common internationally.

Swedish free schools are highly flexible. They tailor curricula to student needs in a creative and original manner. They are growing fast in number—from 80 to 3302 since 1993—with 15 percent of the market share.¹⁸ The free-school market has shifted from being a small school and not-for-profit sector to a growing for-profit sector that is varied and sensitive to personalised learning. Odd Eiken, former Secretary of State for Schools and Adult Education, notes that “the growth, size and variety of the [free-school] sector has exceeded the expectations of both critics and supporters.”¹⁹ Free schools achieve high ratings of parental and student satisfaction. They have open enrolment and receive municipal per capita funding.²⁰

America's charter schools

Charter schools are a different type of public-private partnership. They are now educating nearly one and a half million Americans through 4600 schools. The type of charter awarded to an individual school varies from state to state, but, in essence, a charter is a legal contract between an authoriser (around 800), such as the district education authority or a university, and a proprietor. There are, for example, 506 charter schools in Arizona, 763 in California, 384 in Florida and 333 in Texas.²¹

Like free schools and English academies, charter schools are characterised by autonomy, while being held strictly to account. If they cannot demonstrate improvements in their performance and the value they add as educators, their charter is in jeopardy; it might not be renewed, for example, after its five-year operation cycle. As in the case of Sweden, small communities of parents, teachers and educationalists initially began charter schools. They were localised efforts that focused on meeting specific student needs, taking into account particularity and diversity. However, a growing number of for-profit education management organisations (EMOs) and not-for-profit charter management organisations (CMOs) are now operating.

The Knowledge Is Power Program (KIPP) is the largest CMO with 66 schools.²² KIPP has attracted attention because of examples of extraordinary success in deprived and failing communities. David Whitman's *Sweating the Small Stuff* highlights the distinctiveness of its programme:

- a strict and orderly environment
- regular testing and formative assessment
- a wide variety of pedagogical methods
- long school days and a long school year

- unconventional recruitment of teachers
- school autonomy with regard to curricula and employment.²³

Research professor Paul Hill also points to high expectations, a demanding intellectual climate and content expertise among teachers.²⁴

England's academies

English academies are independent state-funded schools sponsored by businesses and charities. Academies, like their counterpart charter schools in America, experience a degree of freedom in relation to teacher contracts, pay and working conditions, which is not extended to English state schools.²⁵

PricewaterhouseCoopers (2008) notes that academies have the flexibility to negotiate teacher pay outside the national framework of teacher remuneration.²⁶ Moreover, academies "offer incentives as part of salary packages, modify their staffing structures and pay arrangements, and extend their days and offer additional teaching sessions."²⁷ Like charters, academies have powerfully and positively affected outcomes for the lowest-achieving students academically.

In addition to the public-private partnerships operating in Sweden, America and England and dozens of other countries, nations such as India have a burgeoning no-frills private sector that is meeting the needs and expectations of the poorest and typically most underachieving sector in society.

Personalised learning as a contributor to success

International experience tells us that one policy area that promises success is personalised learning. The IPWG considers that the potential of personal learning should be investigated as a way of addressing the underachievement cohort in the education system.

Personal learning has been defined as: "Assessment, curriculum, teaching style, and out of hours provision... designed to discover and nurture the unique talents of every single individual."²⁸ "Personalised learning is learner-led learning, within a framework of standards. [Its] goal is to motivate children and parents to become active investors in their own education."²⁹

Personal learning has had a strong presence in educational strategy, discourse and practice during the last five years. It has an older intellectual pedigree, running back, for example, in UK policy to 1997.³⁰ America, Canada, the UK and states in Australia are currently expanding personal learning for students in compulsory education.

Personal learning has taken root in New Zealand compulsory education. As early as 2006, the then Minister of Education, Hon Steve Maharey, speaking at the New Zealand Principals Federation Conference, stated that personal learning involved:

- flexible learning pathways with an emphasis on informed teaching
- high expectations of students and teachers
- professional leadership with principals being "leaders of learning,"³¹ creating professional learning communities
- strong engagement with the community.

The Ministry of Education has brought personal learning into Standards, Taumata Whanonga, and its National Digital Strategy.³²

Personal learning is seen as being particularly promising for students who have fallen through the gaps. Ruth Kelly in *Higher Standards, Better Schools for All*, presented to the UK Parliament (2005) writes: "Personalisation is the key to tackling the persistent achievement gaps between different social and ethnic groups. It means a tailored education for every child and young person, that gives them strength in the basics, stretches their aspirations, and builds their life chances. It will create opportunity for every child regardless of their background."³³ The UK's Review Group for Teaching and Learning in 2020 holds that personal learning is a core strategy for addressing failure, insisting that "the country cannot accept a situation in which 20% of our children leave primary school without a solid foundation in literacy and numeracy, and one in which 10% of 16 to 18 years olds are not in education."³⁴

Personal learning and personal learning plans aim at tailoring solutions for the diverse needs of individuals rather than imposing uniform answers across a whole sector. Personal learning plans take account of “pupil voice”³⁵ and enable a learning pathway to be negotiated with students that puts their individual needs, strengths, motivations and goals at the core of the curriculum. Personal learning plans, therefore, place students at the centre of learning. In North America this has typically meant smaller schools, multiple pedagogies and sensitivity to learning styles. It has also meant that some providers have operated all year round. Further, personal learning plan providers have tended to concentrate on instructional leadership and developing strong learning communities.

Personal learning success factors

Relevance

Personal learning success is seen to be its relevance. Students are engaged in meaningful tasks. Personal learning plans tailor curricula to be contextual. Learning happens with less emphasis on information and more on skills and understanding. In some instances, this has meant that schools and teachers have emerged as learning brokers, or learning broker mentors, working with communities, outside organisations and parents on behalf of students. Learning broker mentors and students identify specific needs, design personal learning plans and find the best possible provider(s) to teach them. Learning broker mentors might be third parties, not necessarily attached to a school—therefore avoiding a conflict of interest as they recommend particular teachers or institutions.³⁶ Such models of communication, consultation and collaboration with parents, and needs identification of students and support, are not dissimilar to the practices recommended by ERO for New Zealand’s gifted and talented students.³⁷

Information and Communication Technologies (ICT)

ICT is also held to play a vital role with successful personal learning plans.³⁸ ICT encourages personal learning spaces and flexible delivery 24/7, beyond the confines of the classroom. ICT also builds very powerfully on feedback and formative assessment principles, and gives student access to worldwide learning.³⁹

Self-management and skilled leadership

Successful personal learning tends to be delivered in schools that are self-managed with highly skilled leadership.⁴⁰ Providers that offer personal learning plans have been flexible with curricula (Correspondence (TCS), Cambridge International Examinations (CIE), International Baccalaureate (IB), etc) and staffing—they have been able to train, develop and remunerate staff independently. However, self-management does not occur in isolation; commentators hold that providers that share expertise through informal or formal networks have stronger student outcomes than non-collaborating schools.⁴¹

Professionalism

Other factors that lead to improved outcomes for poorly performing students are widely researched and reported, both nationally and internationally. Each of them maps into a personal learning environment. They include:

- the importance of student-teacher relationships
- the quality of learning facilitation with formative assessment and feedback⁴²
- cultural experience, knowledge, sensitivity and integration
- high expectation of students
- motivation
- the right incentives.

As personal learning brings these factors to bear there is lift across the sector.

With reference to student-teacher relationships, local professor John Hattie (Auckland University), finds through a series of meta-analyses that quality relationships between students and teachers, and high expectations of students from teachers (including a blunting and removal of bias attitudes towards certain brackets of students) significantly affect student outcomes. Professor Helen Timperley’s (Auckland University) work and the Ministry of Education’s Best Evidence reports⁴³ elaborate on these findings.

Cultural competence

Of special importance in student-teacher relationships is cultural understanding. It is difficult to see how success for many students in New Zealand can be achieved without this component of learning. The Ministry of Education's policy, *Ka Hikitia* emphasises realising Māori potential and recognising the unique cultural advantage of Māori, focusing on cultural competency without reference to deficit theory.⁴⁴ Russell Bishop and Mere Berryman's (University of Waikato) contribution in *Te Kotahitanga* is especially powerful with its emphasis on formative assessment, reflection, cultural knowledge (manaakitanga)⁴⁵ and empathy in successful learner-teacher relationships in mainstream education. Beyond the mainstream, even richer results might reside in kura kaupapa schools.

Quality learning facilitation

With reference to quality learning facilitation, Hattie, in his final chapter of *Visible Learning: a Synthesis of Over 800 Meta-Analyses Relating to Achievement* writes: "The conclusion seems clear: experts possess pedagogical content knowledge that is more flexibly and innovatively employed in instruction; they are more able to improvise and to alter instruction in response to contextual features of the classroom situation; they understand at a deeper level the reasons for individual student success and failure on any given academic task; their understanding of students is such that they are more able to provide developmentally appropriate learning tasks that engage, challenge, and even intrigue students, without boring or overwhelming them; they are more able to anticipate and plan for difficulties students are likely to encounter with new concepts; they can more easily improvise when things do not run smoothly; they are more able to generate accurate hypotheses about the causes of student success and failure; and they bring a distinct passion to their work."⁴⁶

The relevance of Hattie's summary is that policy initiatives aimed at improving outcomes for New Zealand's failing one in five students, and its high-achieving 5 percent, must be placed in the context of quality learning facilitation. If quality learning facilitation does not occur, then it is difficult to see how other policy initiatives will be truly successful. Policy, therefore, should also aim at creating the conditions that attract high-quality teachers into the profession, the return of New Zealand teachers from overseas and continued work on professional development.

Summary

Earle (2005) notes that personal learning is the "next iteration of an ongoing debate about the purpose and possibilities for education systems in a world that is in continuous flux socially, politically, economically, organisationally and technologically."⁴⁷ With personal learning, policy can be initiated that addresses the 20 percent of New Zealand students who are not reaching their potential, and the 5 percent of students who are gifted and talented. Domestic and international personal learning and personal learning plan initiatives that are student-centred and highly adaptable, offering choice of providers and curricula through flexible funding, are suggestive of what can be achieved. Personalised learning catches the falling and failing.

Proposal

An eight-step initiative has been developed that targets our highest- and lowest-performing students. Its goal is to substantially lift the performance of low achieving students, and to expand the opportunities for learning and success for gifted and talented students. Its goal is also to shift the focus of education unequivocally onto the student, making sure the primary relationship in education is between the provider and the student (with parents at their sides).

This initiative is aimed at 6–16 year-olds. Its key elements are:

- student identification
- provider identification
- a learning broker mentor
- a personal learning plan
- partnerships between learning broker mentors, students, parents and a chosen learning provider
- a student scholarship (weighted funding sufficient to meet the costs of educating identified students)
- provider success payment.

The initiative is consistent with policy already in place in New Zealand.

The eight steps are as follows.

Step 1: Student identification

This involves determining the eligibility and identification of students to be included in the programme, taking into account National Standards and other age-based assessments.

Step 2: Provider identification

This determines the eligibility and identification of providers to be included in the programme taking into account the provider's capacity to deliver its stated outcomes for students, its previous success and its reputation where applicable (based on the quality of its leadership and teachers).

Step 3: Provider prospectuses

Providers publish information on how they lift and extend student performance (which might or might not include a learning broker mentor) and how they tailor their personal learning plans, describing pedagogy, ICT and programme/curricula options, learner-teacher ratios and other factors leading to student success and satisfaction.

Step 4: Students(and family/whānau) choose a principal provider and/or a range of providers

A single organisation might become the principal provider for a student. Alternatively, a range of providers might have the options that meet the needs of the personal learning plan and learning pathway selected by the student (or their family/whānau). The principal provider will need to participate in the programme fully, adopting a monitoring and assessment system which is easily accessed by another provider if a student's learning pathway changes.

Step 5: Personal learning plan agreed

The provider(s) sign up to the students' personal learning plans and to their successful delivery and achievement.

Step 6: First (of two) tranche of student performance fee paid to provider

The amount of the particular student's scholarship would be developed using a formula that weights for the particular student's needs⁴⁸—this will mean that portions of monies currently bulk-provided under different headings may need to be redirected if a fiscally neutral system is the only option. Providers will also be incentivised by receiving more per capita than they currently receive.

Step 7: Performance of student monitored and assessed, amended and supported as necessary including provider, broker/mentor, and family/whānau

Ideally all schools/providers would have a sophisticated monitoring and assessment database, but certainly all those participating in this programme must do so. It would allow not only for transparent monitoring of the particular student but provide for a focus on how teacher professional development can be enhanced.

Step 8: Student succeeds—second tranche of student performance fee paid as a success bonus to provider

Bonuses are paid for substantially lifting the performance of low achieving students or gifted students to new levels.

Optional steps

An additional three steps might assist students in the process. Rather than choosing a provider based on public information, students would be able to opt for a learning broker mentor to assist them in their selection and to negotiate a personal learning plan and learning pathway with the students' provider(s). The following options might occur after step 1, 2 or 3. Steps 5 to 8 remain after these optional steps are taken.

Option: Student (and their family/whānau) chooses a learning broker mentor

Students become the client of a learning broker mentor. Learning broker mentors will be attached to specific institutions (providers, schools etc) or act as independent agents (possibly working with other learning broker mentors in a business or as part of a professional association).

The learning broker mentor's core mission is student progress through a co-designed programme and success at the end of it. The learning broker mentor manages the learning process and is available to students as a mentor as they progress through their chosen learning pathway and achieve their agreed personal learning plan.

Option: Student (and family/whānau) develops a personal learning plan with a learning broker mentor

A personal learning plan would be developed for identified students. The personal learning plan would be entered into a monitoring and assessment database and would be the key tool for overseeing the success of students through any changes in their principal provider and/or learning pathway.

Option: Learning broker mentor and principal provider negotiate a learning pathway

The learning broker mentor and selected principal provider identify the best options for students and their personal learning plan to be achieved (learning pathway) in that particular institution.

Comment

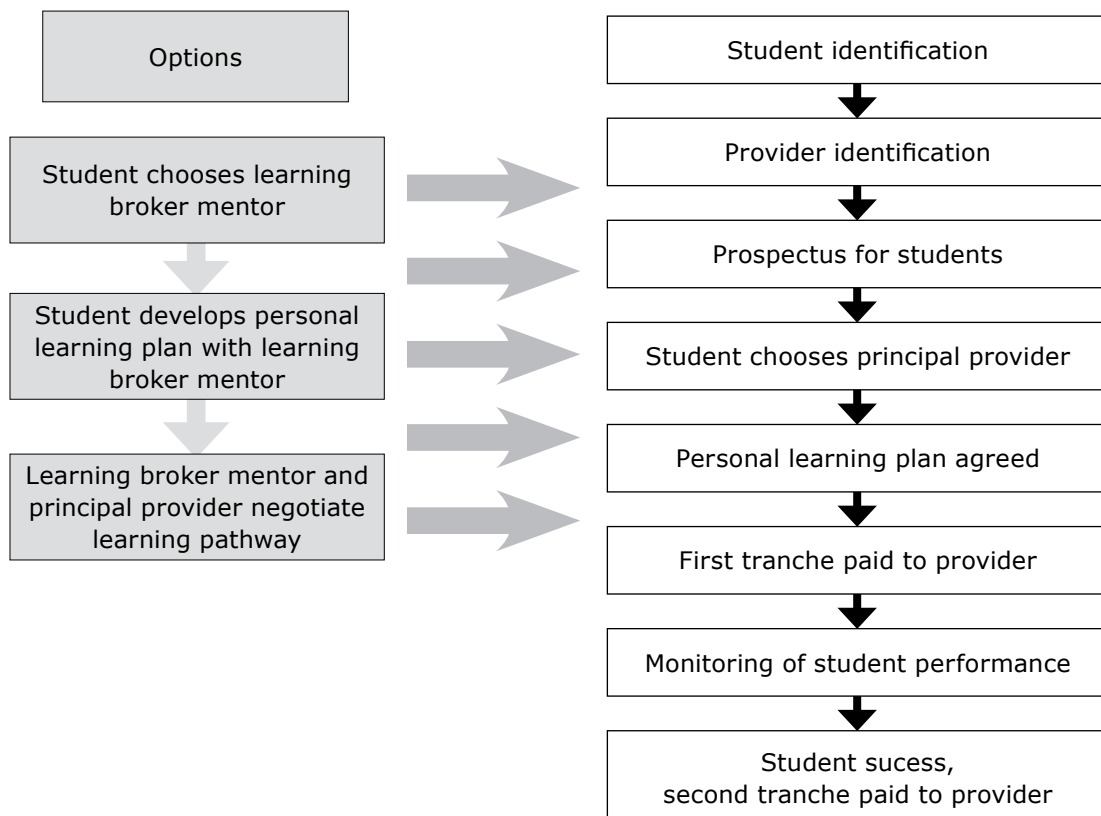
It is expected that funding for this initiative will be fiscally neutral: that monies will be drawn from existing operational funding component reallocation.

As indicated in the eight-step proposal, an individual monitoring, assessment and accountability system will need to be implemented to support the initiative, facilitate the supervision of its progress, and allow timely intervention and reporting.

It is anticipated that there will be several permutations within this initiative. It might mean school-based provision for a number of students, akin to the wrap-around provision that schools make for international students, or a school within a school, or a class within a school with dedicated independent providers. It might lead to a group of students with personal learning plans working across a number of learning providers; or it might lead to a one-on-one arrangement. Additionally, it might see non-traditional locations used for teaching, such as refurbished buildings, community halls or offices.

It is anticipated that non-performing providers will be dropped from the initiative.

If this eight-step policy were stripped down with even fewer options, then the simplest guarantee of student success most likely revolves around the competencies of leadership and teachers, and the quality of teacher-learner relationships. Identifying and funding exceptional leadership and teaching (steps 2, 6 and 8), and encouraging schools or providers characterised by these to expand, franchise or work as a cluster will best target failure and generate lasting success. Good personal learning happens in such a context.



Implications

The eight-step initiative creates a number of implications for the compulsory schooling sector. The key implications are as follows.

Leaders and teachers

There are implications for the recruitment, training and rewarding of learning mentors (teachers) and leaders. As mentioned earlier (page 6), a range of policies and incentives might need to be introduced. For example, creating packages aimed at attracting top New Zealanders who are overseas to come home, or permitting flexibility with training, so that learning mentors are trained on site. Policy might also focus on the professional development and standards of teachers already in the system, so that they can work effectively within a highly personalised learning context. Policy might also open the way, as it has done previously, for professionals with life experience but without teaching credentials, to participate in an educational setting. Furthermore, policy might ease immigration for highly able teachers/school leaders who are sensitive to New Zealand's bicultural commitments.

Te Kura Kaupapa Māori o Te Waiū o Ngāti Porou on the East Coast has in the past, used diverse teacher training options to better serve its students, and in recognition of the particular demands of the kura and of its geographical location. The school, established in 1997, is a Ngāti Porou language immersion school that seeks to understand and engage with the world through the traditions of Ngāti Porou. Staff with a wide range of life experience, not necessarily in teaching, have been trained on site and equipped for the task of teaching through a combination of mentoring and distance learning. Those who have participated in the programme feel that the combination of practical everyday exposure in the classroom and on site interactions with colleagues has provided them with grounded and exceptionally relevant training.

Macleans College stands out for its concern over teacher effectiveness and for its management of staff. The college has developed a unique database, Mancomp, which has the primary function of measuring teacher effectiveness. Teachers' classroom competence is determined using student assessment data from a given period. The database can compare data across year levels and subject areas, providing a comprehensive indication of teacher effectiveness.

Teachers identified as being highly competent in the classroom act as mentors for other staff members at the school. This creates positive collegial relationships. All teachers are expected to formulate goals both for themselves and their students and these are monitored throughout the school year. Macleans' passion is for exceptional results and it sees teacher quality as critical to this mission.

Self-management

It is anticipated providers will be increasingly self-managing, with some new providers entering education (not-for-profit, for-profit and public-private). Like UK academies, American charter schools⁴⁹ and Swedish free schools,⁵⁰ they might have flexible arrangements with curricula, the length of the school day and year, the student roll size, who they choose to train and employ as learning broker mentors, and how they deliver salaries and bonuses.

TŪ TOA is a stand-out example of flexible arrangements in schooling, and has won the highest national awards in sport and gained exceptional school leavers' results. It is operated by the TŪ TOA Charitable Trust in Palmerston North. As a provider, it has brought into being a highly successful programme for a small number of students, many of whom have not succeeded in other educational settings. It illustrates what young men and women can achieve when they are encouraged, challenged and superbly taught in a context that is meaningful to them. Making use of cutting-edge ICT through the Correspondence School,

it has an integrated curriculum that brings sport, academia and culture together to “build excellence in sport and education within a Māori context.” This unique curriculum has led the TŪ TOA leadership to note the need for an integrated funding model to support the holistic development of its students. Each student has an individual learning programme that is “designed to capture the[ir] interests and aspirations.” The conviction that each student is capable of success determines everything that happens during the day.

Property

There are implications for the flexible use of school properties too. As demand increases, so classrooms and space will need to be dedicated to students enrolled in personal learning plans. New arrangements for the management of property might need to be introduced that permit provider expansion in response to demand. This might be rendered through the transfer of all state school property into a new property specialist Crown entity.

Christchurch Boys’ High School is one of a number of schools that is trying to creatively serve public demand for places. It has a well-founded and excellent reputation, yet students are consistently denied access to the school because they live outside its designated school zone. As with other popular schools, hundreds of students are turned away each year.

Fifty or so families move into the zone annually in order to have access to the school. Very few students are enrolled through a ballot system because students within the zone quickly take up all the places. The school would like to accept more students who wish to enrol. Obtaining additional property and facilities, however, is not possible under the current “network of schools.”

The leadership of Boys’ High believes both school property and buildings are grossly underutilised. As a work in progress and a possible way of resolving the unmet demand, the school is considering a satellite unit or two sittings within the school day. The latter option would entail a morning and afternoon sitting with extra-curricular activities taking place in the middle of the day. As a model it would allow much more flexibility for both students and teachers while also addressing the issues of under-utilisation, property and space restrictions.

Enrolment

As the needs of the underachieving 20 percent of students and our most gifted and talented 5 percent of students are met, it is likely that the current school regulations that restrict student movement and association will need to be re-examined. The demands of a personal learning plan might require that students find provision with educators out of zone and in one that is already oversubscribed. It might also necessitate a weighted scholarship that takes into account the individual needs of a student. Such a scholarship could also be split—so enrolment and payment is possible in multiple sites.

Information

Parents will need useful information in order to find the best provider(s) for their child. The provider prospectuses will outline how each provider intends to lift and extend student performance. This information will need to be clear, precise and relevant to enable parents to make an informed decision for their child. It will also need to be supported by a solid record of previous achievement that will likely include a measure that takes into account the progress students have made over a given period of time (context value added measure).⁵¹

Conclusion

The OECD notes: "Personalised learning is the way in which our best schools tailor education to ensure that every pupil achieves the highest standards."⁵² Personal learning and personal learning plans are already practised on a small scale in New Zealand; it is consistent that their use is expanded. None of the elements of the proposed initiative is without precedent in the current system—each can grow and serve student need comparatively easily.

The implementation of the eight-step initiative, with its optional refinements, provides a way for organic and sustainable growth with the potential to generate better outcomes for New Zealand's failing and falling 20 percent, and its gifted and talented 5 percent.

If the initiative is successful it can be extended to the remaining 75 percent of New Zealand students. As indicated in the front of this report New Zealand students generally do well, and some students do exceptionally well. However, all students could do better. While this report focuses urgency on the lowest and highest end of the student continuum, it is the view of the IPWG that success with this 8 step initiative will point the way for an ever more improved New Zealand education system as a whole. The IPWG commends this initiative for the most serious and expeditious consideration.

Recommendation

The IPWG recommends that the Minister:

- establish a Taskforce with the responsibility of establishing this initiative as soon as possible
- invite recommendations for membership and draft terms of reference for the Taskforce from the IPWG
- agree to explore this initiative for implementation in the 2011 school year.

Appendix

The members of the working group were:

Hon Heather Roy (Chair)

Chester Borrows

Sir Roger Douglas

Te Ururoa Flavell

Hekia Parata

Jonathan Young

Paul Henderson and Sarah Clark (Secretariats)

Endnotes

- 1 National Party and ACT Party, "National-ACT Confidence and Supply Agreement," (Wellington Crown, 2008), 6.
- 2 —, "National-ACT Confidence and Supply Agreement."
- 3 *Education Act* (No. 80), 1989 Part 2 s 11 I (1) (d).
- 4 Cited in: Education and Science Committee, "Inquiry into Making the Schooling System Work for Every Child. Report of the Education and Science Select Committee, Forty-Eighth Parliament (Hon Brian Donnelly, Chairperson)," (Wellington: Crown, 2008), 8.
- 5 Ministry of Education, "Briefing to the Incoming Minister," (Wellington: Ministry of Education, 2008), 4.
- 6 —, "Briefing to the Incoming Minister," 4, 5.
- 7 —, "Briefing to the Māori Affairs Committee on Māori Educational Achievement," (Wellington: Ministry of Education, 2009), 16.
- 8 Education and Science Committee, "Inquiry into Making the Schooling System Work for Every Child. Report of the Education and Science Select Committee, Forty-Eighth Parliament (Hon Brian Donnelly, Chairperson)," 9.
- 9 —, "Inquiry into Making the Schooling System Work for Every Child. Report of the Education and Science Select Committee, Forty-Eighth Parliament (Hon Brian Donnelly, Chairperson)."
- 10 —, "Inquiry into Making the Schooling System Work for Every Child. Report of the Education and Science Select Committee, Forty-Eighth Parliament (Hon Brian Donnelly, Chairperson)."
- 11 Ministry of Education, "Briefing to the Māori Affairs Committee on Māori Educational Achievement," 16.
- 12 Education and Science Committee, "Inquiry into Making the Schooling System Work for Every Child. Report of the Education and Science Select Committee, Forty-Eighth Parliament (Hon Brian Donnelly, Chairperson)," 9.
- 13 Education Review Office (ERO), "Schools' Provision for Gifted and Talented Students," (Wellington: ERO, 2008), 25.
- 14 Ministry of Education, "Briefing to the Māori Affairs Committee on Māori Educational Achievement," 12.
- 15 Education and Science Committee, "Inquiry into Making the Schooling System Work for Every Child. Report of the Education and Science Select Committee, Forty-Eighth Parliament (Hon Brian Donnelly, Chairperson)," 25.
- 16 —, "Inquiry into Making the Schooling System Work for Every Child. Report of the Education and Science Select Committee, Forty-Eighth Parliament (Hon Brian Donnelly, Chairperson)," 11.
- 17 McKinsey & Company: Social Sector Office, "The Economic Impact of the Achievement Gap in America's Schools: Summary of Findings," (Chicago: McKinsey & Company, 2009), 6.
- 18 Odd Eiken, "Choice and Vouchers - the Swedish Experience," in *Conference for Educational Policy-makers* (Boston University, 2009), 6.
- 19 Eiken, "Choice and Vouchers - the Swedish Experience."
- 20 Autonomy: Schools in Sweden exercise a great degree of self-management, but in the context that they are accountable to parents and the communities they serve. Swedish school leadership enjoys autonomy over staffing arrangements and curricula. Teacher remuneration is based on a "decentralised individual pay scheme." The National Curriculum is captured in a 17-page document that specifies neither content nor pedagogy, but "hard-core minimum requirements" with regard to skills. —, "Choice and Vouchers - the Swedish Experience," 5, Annelie Strath, "Teacher Policy Reforms in Sweden: The Case of Individualised Pay," (Paris: International Institute for Educational Planning, 2004), 4.

Free association: Schools in Sweden are not zoned. Parents are free to choose any school for their child and entry is on a first-come first-served basis. Schools are free to expand as they wish to meet parental demand.

Funding: Sweden implements a universal, neutral and non-weighted voucher. A municipality decides the value of the voucher that remains consistent for every student. Parents are able to take the voucher to any school they choose for their child. Daisy Meyland-Smith and Natalie Evans, "A Guide to School Choice Reform," (London: Policy Exchange, 2009), 32f.

- 21 Meyland-Smith and Evans, "A Guide to School Choice Reform."
- 22 —, "A Guide to School Choice Reform," 40.
- 23 David Whitman, *Sweating the Small Stuff: Inner-City Schools and the New Paternalism* (Washington D.C.: Thomas B. Fordham Institute, 2008), 252f.
- 24 Center on Re-inventing Public Education, "Ch. 3: Equal Opportunity: Preparing Urban Youth for College (HFR '08)," http://www.crpe.org/cs/crpe/view/csr_pubs/258. Accessed 4 August, 2009.
- 25 Suzanne Allen et al., "Academies Evaluation: Fifth Annual Report," (Nottingham: Department for Children, Schools and Families (DCSF) Publications, 2008).
- 26 Allen et al., "Academies Evaluation: Fifth Annual Report," 180.
- 27 —, "Academies Evaluation: Fifth Annual Report," 9.
- 28 Cited in: Kim Keamy et al., "Personalising Education: From Research to Policy and Practice," (Melbourne: Department of Education and Early Childhood Development, 2007), 10.
- 29 Also see the definition: "...Personalised learning is learner-centred and knowledge-centred: Close attention is paid to learners' knowledge, skills, understanding and attitudes. Learning is connected to what they already know (including from outside the classroom). Teaching enthuses pupils and engages their interest in learning: it identifies, explores and corrects misconceptions. Learners are active and curious: they create their own hypotheses, ask their own questions, coach one another, set goals for themselves, monitor their progress and experiment with ideas for taking risks, knowing that mistakes and 'being stuck' are part of learning. Work is sufficiently varied and challenging to maintain their engagement but not so difficult as to discourage them. This engagement allows learners of all abilities to succeed, and it avoids the disaffection and attention-seeking that give rise to problems with behaviour.
- ...And assessment-centred: Assessment is both formative and summative and supports learning: learners monitor their progress and, with their teachers, identify their next steps. Techniques such as open questioning, sharing learning objectives and success criteria, and focused marking have a powerful effect on the extent to which learners are enabled to take an active role in their learning. Sufficient time is always given for learners' reflection. Whether individually or in pairs, they review what they have learnt and how they have learnt it. Their evaluations contribute to their understanding. They know their levels of achievement and make progress towards their goals...." Department for Education and Skills (DfES), "2020 Vision: Report of the Teaching and Learning in 2020 Review Group," (Nottingham: DfES Publications, 2006), 6.
- 30 Keamy et al., "Personalising Education: From Research to Policy and Practice," 10.
- 31 Hon Steve Maharey, *Speech to Secondary Principals' Council*, 2006.
- 32 Ministry of Education, "Education Initiatives," <http://www.minedu.govt.nz/theMinistry/EducationInitiatives.aspx>. Accessed 24 November, 2009.
- 33 Keamy et al., "Personalising Education: From Research to Policy and Practice," 13.
- 34 Department for Education and Skills (DfES), "2020 Vision: Report of the Teaching and Learning in 2020 Review Group," 7.
- 35 —, "2020 Vision: Report of the Teaching and Learning in 2020 Review Group," 20.
- 36 —, "2020 Vision: Report of the Teaching and Learning in 2020 Review Group."
- 37 Education Review Office (ERO), "Schools' Provision for Gifted and Talented Students," 54.
- 38 Keamy et al., "Personalising Education: From Research to Policy and Practice," 14, 20.

- 39 Department for Education and Skills (DfES), "2020 Vision: Report of the Teaching and Learning in 2020 Review Group," 26-28.
- 40 A skilled leader is critical in raising student performance at a school. John Fleming, for instance, the former principal of one of the worst schools in Melbourne (characterised by 80% unemployment) lifted his student achievement to among the highest levels in Victoria through strong leadership and the recruitment of competent teachers many of whom were trained on-site.
- 41 Department for Education and Skills (DfES), "2020 Vision: Report of the Teaching and Learning in 2020 Review Group," 34.
- 42 —, "2020 Vision: Report of the Teaching and Learning in 2020 Review Group," 31.
- 43 Helen Timperley et al., "Teacher Professional Learning and Development," Best Evidence Synthesis Iteration [BES] (Wellington: Ministry of Education, 2007).
- 44 Ministry of Education, "Ka Hikitia - Managing for Success: The Maori Education Strategy 2008-2012," (Wellington: Ministry of Education, 2008).
- 45 Russell Bishop et al., "Te Kotahitanga: The Experiences of Year 9 and 10 Maori Students in Mainstream Classrooms," (Wellington: Maori Education Research Institute (MERI), School of Education, University of Waikato; Potama Pounamu Research and Development Centre, Tauranga; Ministry of Education, 2003), 201.
- 46 John Hattie, *Visible Learning: A Synthesis of over 800 Meta-Analyses Relating to Achievement* (Oxon: Routledge, 2009).
- 47 Cited in: Keamy et al., "Personalising Education: From Research to Policy and Practice," 9.
- 48 England is considering implementing a pupil-premium for students. This premium will be based on a per-capita basis and weighted to take account for students who are more expensive to educate than their peers. A "geodemographic" classification using individual postcodes is being proposed as a way to determine what students are allocated greater amounts of funding. Sam Freedman and Simon Horner, "School Funding and Social Justice," (London: Policy Exchange, 2008), 7, 8.
- 49 Whitman, *Sweating the Small Stuff: Inner-City Schools and the New Paternalism*, 259.
- 50 Meyland-Smith and Evans, "A Guide to School Choice Reform," 32.
- 51 Australia is launching an initiative on information provision that looks as if it has learned from international first-movers. Information provision will cover: student outcomes; national assessments including literacy and numeracy testing, details on the composition of the student body (socio-economic status), indigeneity, language background, and disability. It will also include information on the type of school; student enrolment; teacher numbers and their level of professional accreditation; student progress through the school (CVA); satisfaction surveys of parents, students and teachers; and sources of income classified, for instance, as bequests, investments or fundraising. The Parliament of the Commonwealth of Australia, "Australian Curriculum, Assessment and Reporting Authority Bill 2008: Explanatory Memorandum (Circulated by authority of the Minister of Education the Honourable Julia Gillard MP)," 6, Justine Ferrari, "Parents to Check Schools Via Internet under Education Plan," *The Australian*, 17 April, 2009.
- Australia has "recognised that parents need to be on an equal footing with a principal or school board in order to be able to have a discussion about school performance, or to be able to choose between schools for their children." Steve Thomas, "Information for Parents," (Auckland: Maxim Institute, 2005), 37.
- 52 Cited in: Keamy et al., "Personalising Education: From Research to Policy and Practice," 23.

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- Justine Ferrari. "Parents to Check Schools Via Internet under Education Plan." *The Australian*, 17 April, 2009.
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- John Hattie. *Visible Learning: A Synthesis of over 800 Meta-Analyses Relating to Achievement*. Oxon: Routledge, 2009.
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