

**NEW ZEALAND SCHOOLS
CURRENT REFORMS**

NEW ZEALAND BUSINESS ROUNDTABLE

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The Author

Stuart Sexton is the Director of the Education Unit in London. The Education Unit researches, formulates and publishes education policy.

His career has involved terms as the Special Advisor to the British Secretary of State for Education and Science from 1979 to 1986, first to Mr Mark Carlisle, now Lord Carlisle, and then to Sir Keith Joseph, now Lord Joseph. A special advisor is a personal political appointment of the Secretary of State, full-time, based at the Department of Education and Science in London, and paid as a temporary civil servant. During that time he also advised and assisted others, including Prime Minister Margaret Thatcher. Before 1979 he researched and formulated much of the education reforms which began to be implemented from 1979 onwards.

It is from this background of being deeply involved in the policies and administration of education in Britain that he was invited to look at the New Zealand scene.

A chemist by training and degree, he was for many years a marketing executive with Shell International Chemicals, and for part of that time with Shell Italiana.

His approach to the management and funding of education is partly influenced by a business background. Nevertheless, he has also taught. After graduation he spent two years in the Royal Air Force, teaching chemistry and running the Chemistry Department of the RAF Technical College.

Stuart Sexton is also a parent of six children. Five have already completed their education through the British publicly funded schools, all of whom have graduated from one or other of the British Universities. The sixth is still at school.

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Stuart Sexton

INTRODUCTION

At the invitation of the New Zealand Business Roundtable, I accepted a brief to study the New Zealand schools and the current reforms, and to report on what effect they would have on the quality of education. It was thought that a complete outsider, from Britain, with no prior knowledge of, or vested interest in, New Zealand education, but someone familiar with the field of education and with educational reform world-wide, could offer an objective assessment.

The concern over public sector education in New Zealand goes back over several years. This concern has only been partly about the quality of education. There has been even more concern about better administration and community involvement. A related concern is how effectively is the system being managed and how efficiently are resources being used.

This concern has been expressed by politicians, parents and employers. There is a remarkable degree of complacency that New Zealand schools are doing well enough, and there is much less concern than I think there should be about the actual quality being achieved.

Because of the growing community concerns with the school system the New Zealand government established a task force, under the chairmanship of Mr Brian Picot, to undertake a basic review of education administration. It met for the first time in July 1987, and published its report in April 1988. The title of the report *Administering for Excellence - Effective Administration in Education* became generally known as the *Picot Report*.

Picot was followed by a government White Paper entitled *Tomorrow's Schools*. This set out the government's response to the Picot report, which did not incorporate all its recommendations. It was published by the Rt Hon David Lange, the Prime Minister and Minister of Education.

Tomorrow's Schools was followed by legislation based upon it, but again there were some modifications. The Education Act 1989 was passed by Parliament on 29 September 1989, and came into effect on 1 October 1989. However that Act was not complete. Further pieces of legislation to implement the reforms are before Parliament. Interpretation of the legislation by the several bodies set up to implement it has yet further modified the original concept of Picot.

This report reviews the sequence of events in the recent phase of reforms. Its coverage is limited to primary and secondary schools and those areas which impinge upon the schools, such as the training of teachers in the colleges of education, and the public examinations.

The report arises from a study of the relevant papers and publications and, more importantly, from interviews and discussions with politicians, officials, principals, teachers, other academics, trustees of schools and, of course, parents.

SUMMARY

Part I of this report outlines some fundamental principles about education, about schools, and about the role of parents, teachers, and the state.

The introductory discussion examines the principles which ought to guide a sound education policy. It reminds us that children go to school to learn, and these schools exist for children, not children for schools. The parents have the primary duty to educate their children, not the state. The state does not have the right to over-ride that parental duty, and while society, through the state, may choose to fund education out of taxation, it does not follow that such schools have to be run by the state; it would be better if there were a wide range of choices that could be made on the part of the providers and the consumers of school education.

Part II sets the scene in terms of the size of the New Zealand schools system, levels of expenditure, and the administrative arrangements for the New Zealand system which applied before the recent reforms.

Part III then analyses, at length, the current reforms as proposed by the *Picot Report*, modified by *Tomorrow's Schools*, and eventually implemented under the Education Act of 1989. It shows that, initially, the intention of Picot was decentralisation of the system to the schools themselves; that *Tomorrow's Schools* drew back from such a scheme; and that in the event, the new system is as over centralised as the old. The old Department of Education has been replaced by a Ministry of Education and by many central agencies, retaining as much central control as before, employing just as many administrators as before, and with central spending as high as before, if not higher. ~~The promise of devolving that money to the schools, alongside devolving the extra responsibility, has not been fulfilled.~~

This chapter analyses administration 'at the local level', showing how the decentralization to the schools has not in fact taken place, and how that could still be done if there were the political will. The report goes on to analyse administration at the centre, showing that most of the central bureaucracy, and the many new central agencies, could be dispensed with if the original intention of Picot were to be carried out.

Having demonstrated where the current reforms have gone wrong Part IV sets out what could still be done. It describes the New Zealand school system as it should be and could be for the 1990s. This is based upon maximum independence of management for all schools, and a minimum of central government control.

Under the reforms outlined in Part IV, we could have in New Zealand, within a few years, a system of all self-managing schools, real parental choice, competition within the system, and funding largely on a per pupil basis.

New Zealand would then be ready by the mid 1990s to switch from funding the schools directly by block grant, to funding education by paying the parents a grant, and the parents using that grant to 'buy' the schooling where they judge best with a voucher or education cheque.

Part V of the report describes that ultimate step. The report concludes with a bibliography.

PART I

SOME FUNDAMENTAL PRINCIPLES

Before embarking upon an analysis of current New Zealand reforms, it is as well to set down a few first principles concerning education.

This seems to be particularly necessary because in all education reforms, (and this observation applies not just to New Zealand but worldwide), there is a grave risk of losing sight of the purpose of education.

While education is a process affecting all people throughout their lives, for the purpose of this report we are concentrating upon the education of children and young people.

Education

Education includes the whole process of learning both skills and knowledge; of receiving the knowledge, skills and wisdom of previous generations; of handing on custom, culture and tradition; and developing the ability to learn.

In short, education is about learning and children go to school to learn.

~~The true purposes of education need to be recalled before we start "reforming" it.~~

Parents' Duty

The prime duty to educate a child rests with the parents of that child or, in the absence of parents, the appointed guardians of that child.

It is, or should be, an act of extreme responsibility to bring a child into the world and, on doing so, the obligation rests with the parents to feed, clothe, cherish and educate that child.

Such education covers all aspects of bringing up a child, and passing on the parents' inherited knowledge and understanding. The family, especially in the child's early years, remains the corner-stone of a "good education".

Formal education usually, though not necessarily, at school is a part of this overall education and parents may well delegate such formal education to others more capable of teaching. Such delegation, however, does not remove their ultimate responsibility for the education of their children.

Parents' Right

If it is the duty of every parent to educate, including arranging formal education, then it is also the parent's right to decide how best to fulfil that parental duty. Parents may well seek advice on this. They may be persuaded, even cajoled, by others but it remains their right to exercise their judgment on what education, and how best to educate.

Such an important principle must not be lost in any "reforms".

Schools

What schools, and most importantly teachers, do is to provide that formal part of a child's education. They do so for the parents and for the children. They are offering a service which the parents, on behalf of their children, can accept, reject or seek to modify.

Schools and teachers are the servants of the parents and their children, not their masters.

Incapable or Irresponsible Parents

The fact that some parents are unable or unwilling to shoulder such parental responsibility is no argument for taking away such rights and duties from all parents.

If most parents and society as a whole see it as their duty to protect those unfortunate children of such irresponsible or incapable parents, it must be done solely and specifically for those children without denying the great body of parents their rights and duties.

It is tempting for the state to take on the welfare of all on the excuse of protecting the few. They must not do so. They must not subvert parental rights and duties.

Role of the state

Just as parents feed, clothe and house their children with their own effort and cost, so too should they educate.

The exception is the welfare element where the rest of society delegates its duty to unfortunate children by asking the state to step in. Other than that, the state need have no role in education, leaving it entirely to the parents.

It would, therefore, be perfectly acceptable if the only state intervention in education were on an individual basis on behalf of individual children where the parents have not the means, and/or the willingness, to see that those children are educated.

In most countries the state has assumed a role in education to the point where, at least in some places, it has presumed to take over the role of parents, to subvert parents' rights and responsibilities, and to presume that the children "belong to the state".

This evaluation must be wrong - morally wrong as well as educationally and financially inefficient. It is as well, therefore, to establish what, in today's society, are the acceptable boundaries of state intervention, and to keep any reforms within those boundaries.

Compulsory Education

It is not necessary for the state to compel, by law, all children to attend school for a minimum period of years. Most advanced countries, however, do just that.

The justification is that most parents would send their children to school anyway and so the "compulsion" is not onerous, but that compulsion gathers in that minority who would fail to give their children adequate education.

I suspect that most would go along with this, although would probably say that even so, exceptions should be permitted in order to respect individual parent's convictions to the contrary.

Opinions differ about the period of compulsory education. In New Zealand the legal starting age is six although five in practice is the norm. In Britain the age is five. Some would argue that a child should start formal education even earlier than that, four or younger. Most parents in New Zealand are putting their children into some form of formal education before the age of six and, in my

opinion, rightly so. There seems to be no need to lower the compulsory school age. Let us retain the freedom of parents to choose when their child should start school, up to the age of six.

At the other end of the period of compulsory education there is more debate. In New Zealand the figure is 15 years old, and in Britain it is 16. In other words, with an increased year at either end, British children have two more years of compulsory schooling than do New Zealand children. In practice, however, in both countries, increasing numbers of children are staying on in education beyond the compulsory school age, to 17 or 18 years.

There is a respectable argument that no young person should be entitled to draw unemployment benefit before the age of 18, on the grounds that children under 18 should be in full-time school, full-time employment or full-time training or apprenticeship of some kind.

If, in order to encourage better preparation for adult life and the world of work, it is thought necessary to raise the age of compulsory education, I would strongly recommend not to raise the school leaving age above 15, but rather to raise to 16 the period of compulsory education training. In other words to require at least a further year of educational training, but not necessarily in school.

"Free" Education

It follows that if the state is to compel all parents to send their children to school (or to equivalent education) - which I repeat is not necessary even if generally accepted - then the state needs to provide the means for the minority who cannot afford to pay for such education themselves.

~~In other words, at the very minimum, the government taxes the whole population and uses the money for those who genuinely could not otherwise send their children to school.~~

It does not follow however that such "free", that is taxpayer supplied education, has to be available to all. It would be perfectly possible, and probably much more desirable, if the state took less in taxes, and only assisted those in need.

In most countries however, governments have adopted the universal approach of raising revenue and then handing it back again in the form of so-called "free" education.

State-Provided Education

Even if one accepts the need for compulsory education, and the convenience of universally "free" education - that is, taxation paid schooling for all - it certainly does not follow that the state has to provide the education, least of all to manage the schools. State funded education need not be state run education.

The mistake our forebears made was to assume that if there was to be universal, "free", compulsory schooling, then the government had to provide the schools. It does not.

The government's presumed obligation could be well fulfilled by requiring that all children attend a school (or its equivalent); by providing the parents with the funds, out of taxation, to pay for such schools; and then to stand back and let the "market" take over. In such conditions, provision would be made by a diversity of providers in response to consumer (parents and their children) demand and to the requirements of quality and quantity dictated by that consumer demand.

Even where governments cannot resist the temptation to "interfere" by also providing as well as funding, the more they leave to the schools, the more those schools have the means and the incentive to respond to parents' and children's wishes. Then parents and children are free to choose from the provision offered and the quality, as well as quantity, of provision will meet the high expectations of those parents more effectively than under a bureaucratically controlled system.

Summary

Children go to school to learn.

Parents, not the state, have the primary duty to educate their children.

In exercising that duty, parents, not the state, must have the choice of school and of type of education.

In providing the funding, from taxation, for schooling, the state has no right to over-ride that parental duty.

In providing the funding for schools, the state has no intrinsic right also to provide those schools, and it would be better if it did not.

The state does have a duty, to the taxpayer, to see that the funds are properly and efficiently spent.

Schools exist for children, not children for schools.

Teachers are the professional educators, but the duty to educate remains that of the parents.

With these fundamental principles in mind, let us move on to considering the detail of the New Zealand schools reform.

PART II
NEW ZEALAND EDUCATION
SIZE, EXPENDITURE, AND PREVIOUS ADMINISTRATION

Statistics on the size of the system, the level of public expenditure and administrative arrangements which applied before the reforms implemented in 1989, have been taken from those published by the Department of Education, and from the estimates published by the government on 27 July 1989.

Numbers of Schools (in 1987)

state Primary and Intermediate Schools	2300
Private Primary and Intermediate Schools	76
state Secondary Schools	354
Private Secondary Schools	47

There are also schools combining the primary and secondary school ages known as area schools, and Form 1-7 schools.

Numbers of Children in School (both state and private)

	1987	1988
Pre-School age	61727	
Primary age	432972	424469
Secondary age	232307	234001
Total Primary and Secondary	665279	658470

This represents a drop over the year from 1987 to 1988 of 6809, or about 1%.

The number of pre-school children, for which I do not have an agreed figure for 1988, is expected to increase very slightly over the next few years.

The number of primary schools will decline to a low of about 418,000 by 1991/2 (*c.f.* figures cited for 1987 and 1988), and then rise by the late 1990s to about present levels, but no more.

The number of secondary school pupils will decline to about 210,000 by 1991, and could be as low as 191,000 by 1997, rising again after that as the slight increase of primary aged children comes through.

In other words, given the present New Zealand population and excluding any large scale immigration, there will be a small surplus of school places in the next few years.

Numbers of teachers (in both state and private schools)

1987 Figures

Primary schools	20693
Secondary schools	13332
Special schools	158

Public Expenditure

	New Zealand\$000	
	<u>1986/87</u>	<u>1988/89</u>
Administration	43546	87180
Pre-school, Early Childhood	47766	69869
Inspectorate, advisory services	44446	57623
Curriculum Development	11523	14985
Recruitment of teachers	673	1175
School transport	67023	78517
state primary schools	756065	1001972
state secondary schools	646252	874165
Integrated schools	11320	24289
Assistance to private schools	17213	15105
Special education	51766	62877
Correspondence school	20382	27621
All school buildings	96516	103866
Teacher education	59243	88229
Technical and Community education	257215	458330
Universities	423993	598935
National Library	40242	73125
Total Education Expenditure	2595184	3569181

This represents an increase in the total public expenditure on education (all areas not just schools) over the two year period 1986/87 and 1988/89 of 37.5% on the 86/87 figure. Inflation over the same period amounted to 12-13%. There has therefore been a substantial increase, in real terms, in education spending over this time.

The figures above show where this increase has occurred. Note that the cost of administration nearly doubled, technical and community education went up almost 80%, expenditure on primary schools increased by a third and on secondary schools by slightly more than a third. Assistance to private schools declined in line with the government's policy of phasing this out altogether.

Education expenditure in 1986/87 represented 12.4% of all government expenditure and 5.1% of GDP, or put another way, \$782 per head of population.

Although education expenditure had increased substantially by 1988/89, so had all government expenditure so that as a percentage of government expenditure, education was 9.6% by 1988/89.

Levels of Expenditure

There is no optimum level of expenditure on education. Education is one of those services where yet more money could always be spent. For the size of the New Zealand economy and population, and compared to other OECD countries, New Zealand's spending on education is generous, higher than many other countries.

There was a time when most governments measured the quality of their education by input, by money spent, on the assumption that the more that was spent, the better the quality of outcome, without actually measuring that outcome.

In recent years, politicians have begun to realise that spending more did not necessarily achieve more, and that what mattered was how effectively and efficiently the money was spent. In other words the true measure of the quality of education offered is outcome, not input.

One of several motives for recent education reforms in many countries has been to achieve more for the money spent - not necessarily to cut the spending, but to achieve more effective spending.

NEW ZEALAND EDUCATION SYSTEM

A brief description may be useful of the arrangements for New Zealand education as put in place by the 1964 Education Act, and prior to the introduction of the reforms foreshadowed in *Tomorrow's Schools* and subsequent legislation.

Minister of Education

Department of Education

3 Regional Departments

10 Education Boards

Primary Schools.

A school committee (a statutory body) for each school.

Schools controlled by one of the 10 regional education boards.

Those boards appointed, dismissed and employed the staff.

The boards received their funds from the Department of Education, and distributed the money to the schools. They controlled all the spending.

Secondary Schools.

Each school had its own local school board which reported directly to the Department of Education.

The school boards employed the teachers.

The boards received a grant from the Department and spent accordingly.

Colleges of Education (or Teachers' Colleges) and Polytechnics

Controlled by councils appointed by the Minister and including representatives of local authorities, the Department, communities, teacher representatives, and so on.

The Correspondence School

Controlled directly by the Department of Education.

State Special Schools

Controlled directly by the Department.

Inspectorate

Controlled by the Department; inspectors of all schools, providing "assistance and guidance to all teachers".

Staffing of all schools

Supervised directly by the Department of Education.

School Certificate**Sixth Form Certificate**

Conducted by the Department

University Grants Committee

The Department funded the UGC, which in turn funded the universities.

Private Schools

~~Regulations control standards of premises. They may only employ qualified teachers, and the salaries must conform to national rates of pay. Private schools have to be registered. At one time the government subsidised teacher salaries in private schools to the tune of 20.5%, but this subsidy is now being phased out.~~

Integrated Schools

Under the 1975 Act, private schools could, voluntarily, become "integrated" into the state system. Once "integrated" they are funded, managed and controlled in the same way as all other schools within the state system.

In practice those that opted for integration were largely the Catholic and other religious schools, who did so for financial reasons. They could no longer afford to continue as private schools.

Universities

Each of the seven universities is established under its own Act of Parliament.

Curriculum Committee

Under the Universities Act 1961, the Curriculum Committee approves course regulations for all the universities with controls to establish equal university degrees and courses.

Universities Entrance Board

This sets the conditions for university bursary and entrance scholarship examinations and maintains common standards for admission to universities.

Early Childhood Services

This category covers:-

- Pre-school classes in primary schools
- Early childhood programme of the Correspondence school
- Kindergartens
- Community pre-school workers

Play centres
Child care associations

Much of this is paid for, in full or in part, by the Department of Education.

Funding

Early childhood organisations, pre-school, kindergartens, and so on received a direct grant from the Department of Education.

Primary schools were funded by a grant from the Department of Education to the Education Board which, in turn, then funded each school.

For secondary schools, the Department of Education grant went directly to each school.

For universities, the Department funded the UGC which in turn funded each university. The funding was on a five year period block grant system.

Salaries

Teaching salaries are determined by the state Services Commission in negotiation with the teacher unions, and paid directly by the Department, and are not included in the grants to schools.

PART III

CURRENT REFORMS : A CRITICAL ANALYSIS

Introduction

By 1986 there was talk of the need to reform education, and in 1987 the government appointed a task force to review education administration.

In questioning many people in the education world as to why reforms were necessary, the usual first reply was that the administration of the education system (as described above in Part II) had grown up over the years on an *ad hoc* basis, and needed rationalising. On pressing for a better reason, it was said the administration needed streamlining to better utilise its money.

These were presented as fundamental goals rather than, as I viewed them, merely means to an end. I had to press hard before I received the answer I was looking for - that the ultimate objective of the exercise was higher quality of education as measured by the outcome (the achievement) of each pupil. Better administration and more effective and efficient use of resources were just ways of achieving a better outcome of the education service.

This revealed an extraordinary complacency about the present quality of New Zealand education - a subject which I shall return to later in this report - as well as a desire to tidy up the administration for its sake, rather than as a means to improve quality.

Picot Report

The task force which was appointed by the then Minister of Education met for the first time in July 1987, under the chairmanship of businessman Mr Brian Picot.

The findings of that task force were published in April 1988 under the principal title *Administering for Excellence* with the subsidiary titles *Effective Administration in Education, Report of the Task Force to Review Education Administration*. The report has become known as the Picot Report.

The report found that administrative structure of education in New Zealand was over-centralised, complex, and needed extensive change. It proposed de-centralizing the administration to the schools; greater consumer choice; better management practices; clear objectives; effective control over resources and accountability. It also pursued cultural sensitivity and equity.

The education world and the public in general were invited to respond to the Picot Report, which they did. According to a Department of Education report, some 20000 responses were received.

Tomorrow's Schools

Arising from the Picot Report, and the submissions on it, the Minister of Education, Mr David Lange, published the Government's response under the title *Tomorrow's Schools* with the sub-title *The Reform of Education Administration in New Zealand* in August 1988. In the words of the Minister's introduction, it

"... sets out the policy position the government has reached following its consideration of the implications of such far-reaching reform. Much of it is an affirmation of the Picot proposals. There are some additions of detail. In some areas the government has chosen to depart from the task force's recommendations."

Tomorrow's Schools drew back from some of the more radical proposals of de-centralisation in Picot.

Tomorrow's Schools was a white paper setting out the education reforms which the government proposed to introduce by legislation. It was followed by an officials' committee to flesh out the proposals contained in *Tomorrow's Schools* in late 1988.

Education Act 1989

Tomorrow's Schools was translated into legislation by the Education Act 1989, which became law on 29 September 1989, and which took legal effect on 1 October 1989. However, before the Act became law, much of the work to implement the proposed reforms had already been done.

However, the Education Act 1989 did not implement all the detail of the proposed reforms. Further legislation has since been introduced to Parliament and more is due in 1990. It would appear that the government has found it necessary to have several bites of the cherry rather than introducing a single, comprehensive Bill.

Current Reforms

In one sense, therefore, the current reforms have only been in place since 1 October 1989 but, in practice, preparation for these reforms has gone on for about a year before.

The rest of this section will analyse each part of these reforms, tracing through each proposal as presented by Picot, translated by *Tomorrow's Schools*, and translated yet again by the Education Act, and often altered in actual implementation. I shall comment favourably, or otherwise, on each proposal both in its original form and either as put into practice or not as the case may be.

Overall, however, the picture is one of good intentions by Picot for the de-centralisation of schools' administration leading to more effective management and, more effective delivery of education. ~~A pulling back from such a radical policy by the administrators/politicians to retain a still over-centralised, bureaucratic system would follow.~~ One area of policy, however, which even Picot inadequately addressed was the creation of genuine consumer choice, which would lead to market pressure to raise educational standards. Decentralisation to the schools is only half a policy; the other half is that those schools must have the means and the incentive to respond to consumer choice.

Decentralization

I thoroughly commend to any student of these reforms Chapter 3 of the Picot Report, *Analysis of the Existing System*. Here, based upon the many submissions the task force received, there is ample evidence of the stultifying effect of a centralised system. I thought much of this chapter was well written and put the case for decentralisation succinctly and overwhelmingly.

I quote from various paragraphs of that chapter to make my point.

"There is an overly high degree of centralisation in our education system. In any system, it is appropriate that some decisions are made at the centre - for instance the making of policy that affects the whole system. But in the New Zealand education system virtually all power and decision making comes from the centre. In most cases where it does not it comes from a few jealously-guarded powers at district level - such as the power to make appointments and to establish building programme priorities. Very few decisions are made at local level: when they are, they are heavily influenced by rules and procedures determined centrally. It is not uncommon for minor personnel matters, such as an individual's leave or reimbursement of expenses, to be referred to the head office of the department for a judgement."

"A highly centralised system is particularly vulnerable to the influence of pressure group politics."

"The more centralised the system, the more important it is to have muscle at the centre. Those who have not, become disadvantaged."

In describing the influence of the NZEI (the primary school teachers' union) upon the development of the central Department of Education, regular consultation at high level between policy makers and teachers is reported. It goes on: "Within this perspective, it is difficult for policy advisors to

maintain a detached stance: there is a tendency for them to become significantly influenced by the interests of teachers and to lose sight of the interests of learners".

The report goes on to describe the excessive consultation with all these powerful groups leading to a paralysis of action. "Such paralysis of will, however, is not uncommon in the current system. In our view, this is the inevitable outcome of a centralised structure which has allowed itself to be driven by pressure group influence."

"Successive Ministers of Education have also been involved in day-to-day decision making. we were surprised to learn that in recent years the Minister of Education has received and responded to over 7000 correspondents each year, and that the Minister regularly receives papers seeking approval of such matters as siting a new school or building a new classroom."

"Under the current system, considerable effort by controlling authorities goes into prescription or proscription of what others may do. For instance, the department currently produces and maintains over two dozen volumes on rules and procedures, including nine pages prescribing how a school is to equip its metal workshop. Authorization of a building project involved 15 or so steps --- each one of which must be approved before the next stage can be embarked upon. one education board's senior administrator held out to use as evidence of progress that his board now offers school committees a choice over the colours to be used in repainting schools."

In the final paragraphs of Chapter 3 of the Picot Report, the task force say that "radical change" is required to remedy all these deficiencies of centralised control:

~~"Finally, too, we are a small country: our national education system consists of fewer children and schools than some local school districts in other countries. So some centralization will always be necessary."~~

Why? It does not follow at all that just because the New Zealand education system is small, it has to be centralised. On the contrary, it could be argued that because it is small, there is no need for some residual centralization.

As evidence for the need for such continued centralisation, Picot offers two spurious examples. One major benefit of recent centralised policies, it says, is the increase in the number of women in senior positions in the primary schools; the other is the introduction of Taha Maori into the curriculum. I shall return to both those examples, but would say that neither needs central direction and that appointments to any positions should be on the quality of the applicant, not on gender. Similarly I shall argue later that as much or as little Maori should be taught as the particular parents want, not as central control dictates.

While introducing a welcome amount of decentralization, even Picot wants continued central control, and actually proposes setting up more national agencies replacing, but in effect continuing, the central control of the Department of Education. Translate that to *Tomorrow's Schools* and we have a new Ministry of Education, Education Policy Advice Agency, Review and Audit Agency, Parent Advocacy Council, National Education Qualifications Authority and Board of Studies, and a Teachers' Registration Board. By the time we have the legislation we find Special Education is once more centralised, as is the curriculum. Perhaps most insidious of all, the charter which each school has to adopt, and which Picot foresaw each school working out for itself, is almost totally written for the school by central government.

So, an excellent case for decentralisation was made by Picot but even Picot could not allow the government to let go all the apron strings. By the time the reforms were actually in place, many of those apron strings were gathered up again into central government control, either directly or through one of the central government's appointed agencies created under the reforms.

ADMINISTRATION AT LOCAL LEVEL

This decentralisation of administration to the "local level" is described in Picot, almost repeated in *Tomorrow's Schools*, and partly implemented in the Act.

Before examining each reform, I will summarise the main proposals for the "structure" at "local and district level" as Picot describes it; for "administration at the local level" as it becomes in *Tomorrow's Schools*; and for the "Control and Management of state Schools" the heading to Part VII of the Education Act 1989.

The School

Each individual school (and other educational institution) is to be the "basic unit of education administration".

Board of Trustees

A "board of trustees" is established for each school for overall policy control.

Principal

The principal is responsible for the day-to-day control of the school, implementation of policy and is responsible to the board.

Charter

A written charter is to be drawn up for each school, and must be approved by the Minister. It sets out the aims, purposes and objectives of the school.

Annual Meeting

The board of the school shall arrange for an annual meeting.

Staff

Staff of the school are appointed, suspended and dismissed by the board of the school, but subject to the requirements laid down in the Act, and the board is the legal employer of both the teaching and support staff.

Property

The Crown continues to own the schools and other educational property, except for the integrated schools (and certain other exceptions) where, as before, the proprietors or foundation (often the Church) continue to own the property.

Maintenance

Maintenance of the property is divided between central government and the school board by a formula.

Funding

Funding to the school is by a block grant, calculated to a nationally determined formula. The board approves the school budget which has been calculated by the principal and staff who are responsible for keeping to it. The block grant to the school does not include teaching salaries and also excludes items of major maintenance and capital works.

Board of Trustees

Secondary schools in New Zealand already had boards of governors reporting directly to the Director of Education. The establishment of boards of trustees for each school therefore amounted to little change for the secondary schools.

The primary schools, on the other hand, had no such individual boards, and a separate school board for each primary school (except where combined boards have been established as permitted under the Act) was a considerable innovation.

The proposal for a Board of Trustees was made in Picot and has been followed through to implementation in the Act.

I am content to accept the term "trustees" but it seems to me that they do the same task as if they were called governors. Their role is one of overall policy making and ultimate responsibility and it seems to me fair to equate the board of trustees of a school to that of a board of non-executive directors of a company, with similar duties and responsibilities.

I welcome having a board for each school and think joint boards should be used sparingly. Each school should have its own board.

The duties and responsibilities of each board will clearly differ according to the size and complexity of the school, but should be taken just as seriously. The need for good and effective management remains whatever the size of the school.

The decentralisation of management to the school through a school board is not new. It has been followed in Great Britain for many years, confirmed and redefined in the British Education Act of 1980. Similarly states within Australia are following the same pattern. Again, we find school boards, under different labels, in the United States, Canada and several other countries.

Such a move in New Zealand seems to me to be totally correct and proper, calculated to lead to the better management of schools, provided that:

- the board is properly and effectively constituted
- the board is given total control of the school
- the board is given the means, including the money, to exercise such effective management
- the board is subject to a minimum of overall national controls.

Regrettably such provisos have not been met, so far, in the current New Zealand reforms.

Membership of School Boards

The Education Act 1989 specifies that the membership of the board for a state school shall be (with slight variations):

- five parent representatives
- the principal
- one other member of staff
- four co-opted members
- one student representative (where the school has students above Form III).

The parent representatives are parents of children at the school and have to be elected by fellow parents. The staff representatives must be on the staff of the school and are elected by fellow staff, and the student member similarly elected by fellow students.

This composition as finally agreed to in the Education Act is very similar to that originally proposed by Picot and repeated in *Tomorrow's Schools*, except that the student trustee was to be elected by pupils of Form I and above, whereas in the Act it is now those above Form III.

There is now danger of losing sight of the purpose of a "board of trustees". Is the board to be a democratically elected, or partially elected body representing those various interests in the school, the "community", parents, teachers, students; a representative body ensuring that, as far as possible, all local views are represented?

Or is it to be a board of trustees, a board of governors, a board of management, a body of people charged with the responsibility and the duty of effectively overseeing the school and its successful operation?

The two purposes are not the same thing, and the second cannot necessarily be done by a board constituted to effect the first.

Parents elected from and by parents of children at the school may be effective in exercising competent non-executive management. However, experience in other countries demonstrates that the kind of parents willing to be elected to the board may know what others should be doing, but are often much less effective in constructive management.

Similarly a very good teacher, elected by fellow teachers, is not necessarily going to be a good trustee.

The board of trustees' purpose is overall responsibility and to deploy relevant knowledge and experience for the effective overall management of the school, in full support of the principal and staff. It would, therefore, be highly desirable to have professional people, with experience in running an enterprise, handling a budget or managing people.

~~The analogy with a non-executive board of company directors is a close one. Such people are appointed (not elected) for their knowledge and replaced if better expertise can be found.~~

A school is a business and can have a substantial "turnover" or budget to be managed.

While there is a political argument for "representative governors" it seems to me that too much weight has been given to representation and not enough to effective management.

I suggest there should be fewer elected trustees and more co-opted ones. And when a co-opted member dies or resigns, the remaining trustees could co-opt the replacement, bearing in mind the need to bring in persons of quality and knowledge.

Similarly, even those trustees who are to be elected, such as parents (and I would say three and not five parents), they should have to demonstrate their knowledge and ability to manage, and those electing them should bear these requirements in mind in making their choice.

I do not think it appropriate to have employees of the school acting as trustees, and I do not think it at all suitable to have a student as a trustee. I would not therefore have either teachers or students on the board of trustees.

The principal of the school should attend all meetings of the board and committees of the board and play a major part in all discussions. The principal should not be a voting member of the board.

Similarly, as the occasion demands, teachers and/or students could be invited to be present for certain items on the agenda, but again not as members of the board.

It does seem to me that the composition of the boards of trustees as recommended by Picot and *Tomorrow's Schools*, and implemented in the Act, is too much to do with representation in the parliamentary sense, and too little concerned for effective management.

School boards of trustees are there first and foremost to give schools effective and efficient management, policy making and a focus of responsibility and accountability.

Duties and responsibilities of the Board of Trustees

If the board of trustees is to be effective and attract and retain persons of quality, it must be given full responsibility for the school. In a totally private or independent school it is the board that takes the final responsibility, and thus delivers the overall policy, ethos and objectives of the school. They cannot refer to, or blame, a higher authority.

There is no reason why boards of trustees of the state and integrated schools should not similarly be given such responsibility provided that, as with the private schools, they have to be accountable ultimately to the parents and their children, and to their paymasters, which is Parliament for state schools.

In the current New Zealand reforms, too little effective control has been devolved to the boards of trustees. I shall amplify that statement under further headings in this report, but, in summary:

- The board is responsible for only a fraction of the money spent on the school. The greatest item of the total budget, the salary bill, is effectively out of their control.
- The power to appoint and dismiss staff is severely circumscribed by (excessive) national rules and regulations.
- The board does not have full responsibility for maintenance of the property.
- The board has no power over expansion or improvements to the property.
- ~~The board does not own the property.~~
- The board is subject to a detailed charter which, contrary to the intentions of Picot, has in fact been almost totally written for them by central government, rather than being decided by themselves.
- The board is subject to a host of over-riding national agencies set up under the Education Act which limits and curtails their freedom to manage.

The concept of decentralising management to the schools through a board of trustees is an admirable concept in itself, but has been thwarted by not giving the board of trustees the power, responsibility and the means of total management.

The result is that, unless such full management is granted soon, the benefits of genuine decentralised management will not be realised and the reform programme will be brought into disrepute.

Another aspect of this failure to grant the newly established boards of trustees real power and responsibility is to create disillusionment for the trustees.

It was a pleasure to find how enthusiastically people in New Zealand had put themselves forward to serve on the new boards. There has been no shortage of people willing to serve. If, however, after a year or less, those people find their board is little more than a talking shop, with much of the decision making taken elsewhere, they will become disillusioned with the concept. Either they will stand down and not offer themselves for re-election or the 3000 (or so) boards of trustees will become 3000 individual little lobby groups.

This fear that the boards of trustees will become merely another set lobbying vested interests was shared by many. The solution is to give those boards the power, the responsibility, and the means to manage.

The Charter

Picot (page 45) states:

"In collaboration with the principal, the staff, and the community, the board will be responsible for the preparation of the institution's charter and will determine any optional elements within the national objectives for education. The charter will be expected to define the purposes of the institution and the intended outcomes for students. It will also define the ways in which programmes will be designed to take account of the particular interests of students and potential students; the special skills and qualifications of the staff; the resources of the community; the particular wishes of the institution's community."

And it goes on:

"The initial preparation of the charter will be a time-consuming task. It will, however, be a valuable exercise in which common understandings can be developed. Subsequently, charters will be reviewed as required. The charter of each institution will be approved nationally by the Minister, on the recommendation of the Ministry. It then becomes a contract between the state and the institution, and between the institution and its community."

Tomorrow's Schools says much the same thing, indeed using many of the same phrases as in Picot, but also says:

"The Department of Education will establish a liaison group to help boards develop their first charter."

Notice the seemingly innocuous phrase in Picot "will determine any optional elements within the national objectives for education". Elsewhere it speaks of "the standards to be achieved within the national objectives". *Tomorrow's Schools* establishes a seemingly helpful liaison group to "help" the boards to prepare their first charter. Now turn to the Education Act itself, Sections 61, 62 and 63.

Every charter,

"shall be deemed to contain all elements of the national curriculum objectives and national education and guidelines for the time being specified by the Minister"

"Specify the maximum roll for the school"

"The Minister may make any amendments the Minister thinks desirable"

"The board shall take all reasonable steps to discover and consider the views and concerns of Maori communities living in the geographical area the school serves."

"Every charter is deemed to contain the aim of developing for the school concerned the policies and practices that reflect New Zealand's cultural diversity, and the unique position of the Maori culture; and the aim of taking all reasonable steps to ensure that instruction in Tikanga Maori (Maori culture) and Tereao Maori (the Maori language) are provided for full time students whose parents ask for it."

As you move from Picot to the Act itself, the charter becomes less the work of the people of the school, and more that of the government.

Let us then look at the *Charter Framework* which was issued by the government in May 1989. All schools were given a model charter they had to follow. Let us examine how this finished up as a school charter by looking at one prepared by a primary school near Wellington.

It is only a slight exaggeration to say that the Charter was written for the school by the government, or by its agencies, with the school inserting its name in the right places, and the board signing on the dotted line.

Page 4 of the *Charter Framework* allows the school to describe itself in general terms. My sample school did so on 1.5 pages including how many teachers, a non-teaching principal, so many part-

time teachers, a dental nurse, and so forth. The school is allowed to devote another page to a description of the area that the school has traditionally served.

From then on, the school charter follows the Charter Framework exactly, inserting the name of the school where appropriate; the guiding principles, paramount principle, other principles, equity, equal educational opportunity, Treaty of Waitangi and mission statement, for the remaining 26 pages. It is signed by the Chairperson of the Board of Trustees, with space left for the Minister to sign.

He should have no difficulty signing, as it is virtually a reprint of the charter he sent to them in the first place.

The whole charter exercise has been made a mockery. The national guidelines and objectives referred to in the reports are, in fact, the charter. Contrary to Picot's assertion, the initial preparation of the charter will not be a time-consuming exercise, not by the boards anyway. It is all done for them before they are even allowed to think about it.

Some schools, I hope, will rebel against this total imposition of the charter preferring to write their own. The Minister, however, can amend their charter to suit himself, after so-called consultation of course, and then the Minister can approve it. So it will still finish up as the Minister's officials drafted the framework anyway.

This is another blatant example of the government seeming to devolve power and responsibility to the schools, but in fact holding on firmly to the reins after all.

~~I will comment further, under separate headings, on some of these national objectives required by the government and inserted into every charter, including that chameleon word "equity" which appears everywhere.~~

I shall just say that far from giving the schools freedom to develop their own ethos, and to respond to the needs of their children and their parents and their community, the government has, through the charter, put them in more of a straitjacket than they were before.

Not only should any such charter be the work of the board of trustees themselves, but it should be brief, fulfilling legal obligations (such as complying with employment legislation), and be of a general nature.

I suggest a general statement of intent of two or three pages is the maximum that is needed. Let the school develop from there, not spelling out such things as numbers of dental nurses, but responding to parental demands and children's needs, responsive to its customers, not to some administrator's pre-conceived idea of what those customers want.

The charter as it has turned out in practice drives a coach and horses through the whole concept of this education reform. Unless it reverts to a general statement by the board of trustees themselves, not the government, I believe decentralization and management of schools is doomed before it even starts.

Principal

The Education Act (Section 76) says:-

"A school's principal is the board's chief executive in relation to the school's control and management.

Except to the extent that any enactment, or the general law of New Zealand, provides otherwise, the principal,

- a) shall comply with the Board's general policy directions; and

b) subject to paragraph (a) of this subsection, has complete discretion to manage as the principal thinks fit the school's day to day administration."

I would go along with all of that, if only the principal really did have complete discretion to manage, and not be circumscribed by the charter and by so much more centralizing legislation.

Appointment of Staff

The Board of Trustees become the employers of the school staff whereas for the primary schools, the education boards had previously been the employers.

Thus, in Picot, we read (page 47):

"The board of trustees will appoint the principal."

That is probably the most important job any board of trustees has to do. If the trustees can get a really competent, dynamic principal, they can almost sit back and watch the school prosper. If they get it wrong, they must remedy it without delay, and have no qualms at all about dismissing an unsatisfactory principal.

Of course, when the reforms came on 1 October 1989, the principals of most schools were already in place, installed under the previous dispensation. Only as the years pass will boards of trustees have the opportunity to appoint new principals as old ones retire. That said, they must be well aware that as well as having the power to appoint they also have the power to dismiss and that provided they follow the proper procedures as laid down in employment legislation they can and should dismiss an unsatisfactory principal.

Picot went on:

"Appointment of the principal will be on a contract within a salary range established nationally. The term of the contract should be negotiated between the board of trustees and the principal."

Now in fact the state Services Commission have negotiated the principals contracts, not the school boards. Here is another area where the government was unable to let go the apron strings. The board of trustees should be free to negotiate the principals' contract (even if they choose to follow some standard model) and, as I shall expand upon further, should be free to negotiate the salary.

Picot went on to be too prescriptive about how a board of trustees should go about making the other appointments of staff at the school, suggesting when the full board should make the appointment and when they should delegate it to the principal.

That prescription was not repeated in the Education Act and, as I interpret it, the school board can in fact make its own rules as to whether it interviews every applicant for a job, or merely confirms the principal's selection. That is how it should be anyway. For a small school the board will no doubt wish to be directly involved in every appointment. For a large school they may well delegate to the principal the appointment of basic-scale staff, and indeed teachers above basic-scale.

Where the board of trustees' powers of appointment are severely curtailed by the Education Act is who they may and may not appoint as teachers.

For example, if the board considers a person "likely to be of value to students (whether Maori or not)", and who in the board's opinion can "impart", "encourage", or "inspire" the Maori language or culture, they may employ such a person as a teacher, whether or not that person has a teacher's qualification, any training as a teacher, or shows any ability to teach.

On the other hand, for all other subjects, the teacher has to hold a current practising certificate as a teacher which is granted by the newly established Teacher Registration Board. Short-term exceptions to that rule are permitted to fill, for example, a temporary vacancy but in general the

Teacher Registration Board holds the key as to who may teach and who may not, even to the point of withdrawing a teacher's licence to teach. That is monopoly power.

How much better if there were several routes to become a qualified teacher, and if the board of trustees were free to judge how good one qualification was compared to another.

Picot also proposed that all teacher applications should be advertised nationally. Such a prescription has been tried in other countries. It means that if the board have already decided, unofficially, on the applicant they wish to appoint, they also have to advertise nationally, interview the resultant applicants, and waste time and money only to end up appointing the person they chose in the first place.

Boards of trustees must be left to advertise, whether locally or nationally, as they see fit.

Financial Grants to Schools

I have already argued that for the effective self-management of schools, the board of trustees must be given full power and responsibility to manage. This has not yet been done and they risk being merely rubber stamps of the government or government agencies.

Similarly, for effective management, the board of trustees should be given an annual block grant covering the total expenditure at the school. The board should then be free, within that sum, to budget as they think fit, advised closely by the principal and, I would recommend, by a bursar.

~~It may be, for example, that some essential maintenance has in the past been neglected and an extra allocation for it has to be made at the expense of something else. Better still, the board may devise a rolling programme of maintenance, allocating a certain sum each year.~~

It may be that the school is short of teachers and the board decides that more should be spent upon teachers' salaries than in the previous years. Or that different computers, laboratory equipment or text books are needed.

Whatever it is, the board of trustees, just like the board of any company, should be free to spend as they judge fit within the overall fixed sum allocated to them by the ministry. (I comment on the formula for allocating that sum in the next section.)

Regrettably none of this financial freedom has been given to the schools.

The Education Act (Section 79) states:

"In each financial year a Board shall be paid, out of money appropriated by Parliament for the purpose, ---

- a) a teacher salaries grant; and
- b) an operational activities grant.

Each grant shall be of an amount determined by the Minister.

Section 80 provides that:

"Except with the consent of the Minister, and in accordance with any conditions subject to which the consent was given, no Board shall:

- a) use any part of a teacher salaries grant for any purpose other than the payment of teacher salaries; or
- b) use any part of an operational activities grant for the payment of teacher salaries.

Section 81 says:

"A Board shall not pay any part (or all) of a teacher's salary out of money that is not part of a teacher salaries grant or an operational activities grant except... with the Minister's consent."

Elsewhere in the Act, and in subsequent regulations, the Minister sets the numbers of teachers the school may employ, and the government (or the unions?) sets the salaries, giving the board a small amount of discretion as to which salary scale is paid.

Furthermore the teacher salaries grant is not directly paid to the school, for the schools are obliged, under another part of the Act, to use the Payroll Service established by the government. There is a tentative suggestion that in two years the school boards may be allowed to make out their own staff salary cheques, or hire a company to do it, but for the present it remains nationally paid.

The salary bill of a school will be around 70-80% of the total expenditure on that school so, in practice, the board of trustees only handles about 20% of the total budget. They may not switch funds from that 20% "operational activities grant" to the 80% "teacher salaries grant", or vice versa.

Even if they are successful in attracting money from elsewhere, such as donations, they are prevented by law from spending that money on teacher salaries.

~~So the most important function of any board, for a school or a company, namely to manage people, has been severely curtailed through this tight control of how the money may be spent.~~

In practice, the rest of the school budget is set by one government regulation or another. Even the travel costs and attendance fees that the board of trustees pays to its individual members are covered by the government scale, despite the fact that the money actually comes out of the operational activities grant.

Until the total block grant, including salaries, is handed over to the board of trustees for them to spend as they see fit the reforms will not achieve effective and efficient use of the money.

Audit

Quite rightly, the Act requires boards of trustees to prepare an annual financial statement, and to do so "in accordance with generally accepted accounting practice".

Such a statement then has to be filed with the Audit Office for approval.

This is an acceptable and necessary measure of financial accountability. I would only observe that it would have been better still if each school were constituted as a company in law, and had to submit audited accounts to the companies registry in the same way as all other commercial companies. That would be an even more open, more independent, measure of financial accountability.

Maintenance

Quite an extraordinary formula for the maintenance of the school property has been devised.

Minor maintenance is to be managed by the board of trustees and paid for out of their block grant. Major maintenance (as defined in the regulations) is handled and paid for by central government as a special one-off operation.

Clearly the shrewd school board will let as much maintenance as possible fall from the minor to the major category because then they will not have to pay for it out of their own budget. There is an in-built incentive in the present scheme to let property deteriorate, transferring responsibility for the cost of the central government.

The only solution is to make all maintenance the responsibility of school boards and, in my view, that can only be done properly if the ownership of the property is also vested in the board. I shall expand upon that proposition in Part IV of this report.

Capital Spending

As for major maintenance, capital works for improvement or expansion of schools remain at the discretion and cost of central government. It is a powerful weapon for the government to restrain the successful school wanting to expand. Again I shall argue in Part IV of this report that a policy for capital works, while not giving boards a blank cheque, should be at their instigation.

Funding Formula

There has already been widespread dissatisfaction at the funding formula adopted towards the end of 1989 for the first year of operation of the Education Act. To be more precise, the dissatisfaction was with the actual lump sum, the "operational activities grant", which was finally allocated to schools.

Rather than being a simple, national formula applicable to all schools, the government has adopted a school-by-school approach which, whether the accusation is justified or not, smacks of fiddling the figures according to the strength of vested interests and the effectiveness of local lobbying.

The more that special grants are included in the overall sum, the more confused it becomes, and the more distrustful are people of the fairness of the system. Even at the risk of rough justice the funding formula should be very simple and almost entirely based upon a per capita sum and, unlike the present formula, there should not be a multitude of per capita sums for a multitude of ages of children. We do need a much more careful assessment of how much more expensive it is to educate a 15-year-old than a 7-year-old - if indeed this is the case. We certainly need an incentive to schools to attract pupils to that school, and to retain them beyond the age of 15. A per capita formula does that. On the other hand we do not want a school to continue to register a pupil over the age of 15 if that child's continued education would be better provided elsewhere.

Apart from the per pupil formula, divided perhaps into three bands covering three age groups, the extras should be severely limited.

One obvious extra is a per capita grant for those children for whom English is not the first language. This extra grant should be because the child's home language is not English, not because the child is from another ethnic group.

Another extra per capita grant would be to cover the extra expense of teaching a physically or mentally handicapped child. The government would even, if they wished, build in a financial incentive to schools to take such children. This would apply, however, only if the board of trustees then had the freedom and responsibility to use the money to best provide for those children's "special needs".

As it is, under the Education Act and contrary to Picot's original recommendations, special education has been retained, both managerially and financially, under central control. Thus a school board does not pay directly for children at the school with special needs but merely hands them over to the special education board. This is a mistake on the part of the Education Act which I shall return to under the section on Special Education.

It is essential for any scheme of devolved management to be generally acceptable, both to the teaching profession and to the public. The formulae upon which the grants to the schools are made have to be fair, simple and clearly understood. No board of trustees is going to give their best in managing a budget if they believe that money has been unfairly withheld from them.

Clearly in the last few weeks before Christmas 1989, when at long last the final figures for the school grants were belatedly announced, there was widespread dissatisfaction with the figures.

While some of that protest would have been voiced anyway, there does seem to me to be justifiable complaints from many school boards.

I have not studied in depth this most vital aspect of these reforms, the funding formula so cannot comment further in this report. I would strongly recommend that, as a matter of urgency, such a detailed study should be made, preferably by examining a wide sample of the present budgets to see the effect of the funding formula already adopted. I would hope that this could be done in time for next year's formula to be more accurate and published in plenty of time for the school boards to take into account in preparing their next budgets.

ADMINISTRATION AT THE CENTRE — CENTRAL CONTROL

Far too much control has been retained centrally. The initial promise of decentralisation offered in Picot (though the task force still left too much to the "centre") was largely lost by the time the Education Act was implemented.

It may well be that the politicians who put these reforms into train, painted the canvas "with a broad brush", leaving it to the administrators to work out the detail. If so, it was a grave mistake, for experience has shown many times over that for major reform to be successful it has to be followed through in detail by the reformers. Otherwise the reactionaries will assert themselves in no time and undermine such reforms.

Whatever the reason, it does appear that the Department of Education, which was to be replaced by a small Ministry of Education has reappeared under five new labels, plus sundry independent agencies.

Department of Education

The old Department employed some 2500 persons and, if the old education boards are added, we get about 3000 or so persons employed in the old central administration of education.

On a superficial reading of Picot and subsequent reports, we might suppose that that 3000 was to be reduced to 300 in the new Ministry of Education, affording us one tangible outcome of the decentralisation process --- 10 times fewer administrators.

Regrettably, the new Ministry of Education is turning out to have about 800 or so employees, not the 300 as promised. More importantly, the Department of Education has really been reborn with five heads:

- Ministry of Education
- Education Review Office
- Special Education Service Board
- Early Childhood Development Unit Board
- The General Advisory Service

In addition to these five, there are the following further bodies which effectively take over duties previously under the Department of Education umbrella and, at least for the present, are still funded centrally:-

- Parent Advisory Council
- Teacher Registration Board
- National Examination and Qualifications Authority (NEQA)

- National Library (now incorporating the National Film Library and the School Library Service)
- Correspondence School
- School Publications (incorporating the Visual Productions Unit and Audio Production unit)
- Rural Education Activities Programme (REAP) (to be reviewed in 1990).

There are further agencies concerned with tertiary education, which is not the subject of this report.

Central Bureaucracy

The promise of a much reduced central bureaucracy has, therefore, not happened. When all these new boards and agencies have taken on their full complement of staff, there could well be more administrators than there were under the old system.

Most of the new boards and agencies have been staffed by people formerly employed by the Department of Education, the Education Boards, or one of the other preceding bodies.

As a senior government official put it to me, the old Department of Education officials are reasserting themselves all over again: "enlightened self-interest, masquerading as moral principles".

Not only have most of the old civil servants got their jobs back, but most of those appear to have benefitted financially. All those in the Department of Education and associated previous agencies, which were scrapped under the new Education Act, were offered handsome redundancy terms.

Many took the redundancy terms and then applied for, and obtained their "new" job in one of the successor bodies to the Department of Education. For some it was even returning to their old desk.

I am not, of course, asserting that anyone has acted illegally. Such "redundancy" and "re-employment", with attendant redundancy money, has been possible under the rules of the game. I am suggesting that the rules of the game need changing. I imagine it will be the state Services Commission who will wish to look into the considerable cost of the redundancy package handed out under the Education Reforms, and possibly recommend changes for the future so that persons re-deployed or transferred within government do not get the same massive handouts normally reserved for those who are genuinely redundant and out of a job.

In the manner that the education reforms have been implemented, the central bureaucracy has not been drastically cut. On the contrary it has probably expanded slightly and yet a considerable extra cost (redundancy) has been incurred.

There is another unfortunate aspect of this reorganisation of the central bureaucracy. Given that the whole system was to be turned upside down to be replaced by a "better" one, the opportunity should have been taken both to arrange severance for all those persons who were less than competent, and to install outsiders who could have injected a fresh approach.

As it is, preference has been given to those formerly employed in the system, that is, those theoretically made redundant. Outsiders from commerce or industry could not be considered in preference to former education employees, with the possible exception of the very top managers in the new system who might be recruited from outside.

Financial Implications of Continuing Central Control

Picot had proposed that many of the services formerly provided by the Department would become the responsibility of the schools and the other institutions themselves, who would buy in such

services as they choose. This would cover not only books and equipment but advisory services, teacher in-service training, special education needs, and so on.

Picot therefore proposed that the funding for those services, formerly spent on behalf of the schools by the Department, would be transferred from central government to the schools themselves. Picot did not set out to effect a reduction in the overall expenditure on education, but to redistribute the money (alongside the duties) to the schools themselves.

In addition, Picot assumed the slimmed down Ministry would be less costly (fewer staff) and that this saving would be handed on to the learning institutions as a part of their budgets.

The assumed saving on a slimmed down Ministry was a net cost reduction of at least 25% providing at least \$17.5 million for distribution to the schools.

The cost of the services formerly administered by the centre was put at \$129.8 million, of which Picot attributed \$88.6 million to the primary and secondary schools, and assumed this would also be added to their budgets.

The decentralisation process on Picot's assumptions would transfer a total of something like \$106.1 million from central education spending to the schools themselves. Of course, the schools need that extra money since they are now given extra responsibilities including purchasing the services that were formerly provided in kind.

In the event, as I have shown, the central bureaucracy has not been reduced, the savings on central spending will not be achieved and the schools will not get extra money for the services they are expected to buy.

Even worse, on my calculations, overall central education spending seems to be about \$300 million more than before the reforms.

Apart from the clumsy way that the funding formula was arrived at, referred to earlier on page 34, it would seem that while some of the central services had been transferred to the schools, the money has not gone along with them.

Ministry of Education

Picot proposed an "Education Policy Council" and defined its purpose as "to evaluate, debate and recommend policy to the Minister".

Tomorrow's Schools rejected that: "There will be no permanent independent body established to formulate policy".

It is the Ministry of Education which will provide policy advice to the Minister, and will oversee the implementation of national policies approved by the Minister. The Minister may, however, establish specific task forces for special policy projects.

In proposing a Ministry of Education, it had been suggested that staffing of around 300 would be sufficient. The old Department of Education had over 2500 staff. In practice the new Ministry of Education is already up to about 800 staff.

The Ministry of Education, replacing the Department of Education, has a chief executive officer who reports directly to the Minister of Education.

Within the Ministry are departments concerned with policy advice, property and operational activities. It is open to the chief executive officer how the Ministry's structure is organised, working within a strategic plan developed by the implementation unit.

The Ministry covers such functions as establishing national guidelines, setting national curriculum objectives, recommending approval of charters to the Minister, ownership of the educational

property with responsibility for capital works, funding the institutions and responsibility for special payments to the schools, such as in the case of fire.

The Ministry is free to establish regional offices again. It has 10 divisions and the District Operating Division merely duplicates locally the advice provided centrally.

That amounts already to a considerable package of central control. National guidelines and national curriculum objectives can cover almost everything a school does and, as the charger exercise has already shown, the new Ministry intends to take just as much control as the old department.

Education Review Office

The Education Review Office (ERO) is sometimes referred to as the Education Review Authority (ERA) and was described in Picot and in *Tomorrow's Schools* as the Review and Audit Agency.

The ERO is "charged with the responsibility of reviewing the performance of educational institutions".

As the ERO itself suggest in one of its papers, "some people may regard reviewing as another form of inspection, and see the roles of reviewers as the same as inspectors, who were employed by the previous Department of Education".

However, the ERO asserts that the new "reviewers" have a different role to the old inspectors, as follows:

- ~~"Inspectors provided advice and guidance to schools and often promoted, or were seen by teachers as promoting, particular teaching methodologies or philosophies. Reviewers have no such role."~~
- "Inspectors directed the system, often by approving school organisations, participating in appointments procedures, or being involved in school based, or wider, discussions about the ways in which schools might be organised. Reviewers have no such role."
- "Inspectors allocated resources, often by determining priorities between competing schools. Unsuccessful claimants often saw their lack of success as evidence of the covert influence of inspectors. Reviewers will not allocate resources."
- "Inspectors had a central role in teacher registration, classification and certification. They influenced the advice and guidance given to newly trained teachers, and had a major role when a teacher's competency was in question and removal of classification or certification was being considered. Reviewers will have no involvement in either of these processes."
- "Inspectors were often criticised for their inability to respond quickly and appropriately to a range of matters, such as building renovation, replacement or extension, curriculum development and resources, basic equipment supply and grants which depended upon regional or head office departmental policy decisions. In fact, inspectors often found themselves more in sympathy with the efforts of teachers to provide appropriate educational experiences to children than with the official line promulgated by the Department. Similar role conflicts will be avoided by reviewers."

The ERO sees itself as having consultancy and accountability roles but not an inspectorial role, and the ERO very firmly states that its reviewers are not inspectors.

The ERO, in another part of the same paper, says of the old inspectors: "They were involved with a system that they had earlier worked in as teachers and principals and then directed, developed, resourced, assessed and protected as inspectors."

"No one doubted the integrity of inspectors, but almost everyone, except occasionally the inspectors themselves, saw role conflict as a major obstacle to objective performance."

The ERO has to review the 2300 primary schools, 300 or so secondary schools, 40 area schools, and about 300 early childhood centres. To do this, the ERO has established 11 districts throughout New Zealand and, on average, each district will employ 30 persons (reviewers).

The overall establishment of the ERO is thus about 350, although at the end of 1989 there were about 100 of that number still to be appointed.

Under the Act, all schools are subject to a complete review every three years. Such a review will cover all aspects of the school, curriculum, and teaching, premises and maintenance. I understand that for the larger schools such a review is expected to take a team of reviewers several weeks at the school plus time spent writing up the report.

We have, therefore, a new empire created under the Act, a 350 person strong Education Review Office.

Given that this review office is charged with a most detailed review of every New Zealand school at least once every 3 years, it can be fairly argued that this is not "empire building" for the sake of it, for it will need 350 persons over 11 district offices to do such a job.

We may, however, question whether the task given to the ERO is the correct one and needs be done. I believe it is not.

~~Having set up boards of trustees for each school, we should charge those boards of trustees to take full responsibility for their school, just as a board does for a private school.~~

Such effective "management" by a non-executive board and through a chief executive, namely the principal, includes all aspects of running a school. Appointing the staff, ensuring the quality of teaching and its continued quality, ensuring a proper and appropriate curriculum is covered, ensuring proper care and maintenance to the property.

For the larger schools the board may well choose to set up committees of their members to undertake certain aspects of this work, perhaps a finance committee, academic committee, or an estates and management committee.

They will constantly review the running of the school by observing its effectiveness, taking initiatives and solving problems as the occasion arises.

There is no need to duplicate such management by having an ERO to review it all over again. There is also a strong argument that even with the best will in the world, the reviewers of the ERO will absorb a considerable amount of the school staff's own time over the several weeks of the review so reducing not improving, the school staff's management and teaching time and their effectiveness.

As the ERO themselves quite firmly assert, they are still not inspecting the schools, they will have the "single role of helping educational institutions to better evaluate their own processes and achievements".

In my view there is a need for an independent inspection service for the schools, but one which does inspect, and one which incorporates the role of policeman, fire brigade and consumer protection.

In other words, given real freedom to the boards of trustees to run their schools and to parents as to which school they send their children to (accepting that for practical reasons such choice will be limited), let there be an outside independent agency which, through the means of random inspection, ensures that the schools comply with the law and with providing the highest possible standard. Through publishing the inspection reports, it should afford a high measure of consumer protection and by specific request of the Minister or other competent, relevant person or group of persons, it should investigate specific allegations of poor performance or otherwise unsatisfactory outcome of the school - in other words, a fire brigade function.

Such an inspection service works largely as an insurance policy. Its presence, random inspection, and publication of inspection reports, serves to keep all schools on their toes.

As such, for the comparatively small number of schools in New Zealand the team of inspectors need be nowhere near the 350 reviewers of the ERO. Probably 50-60 would be sufficient.

The team would need to be inspectors and be highly competent persons of knowledge and experience, and persons whose competence to inspect is generally accepted by the teaching profession.

In any view, therefore, the ERO has been given a job which should already be done by the new boards of trustees themselves and, by its very nature and self-proclaimed aims, it is not going to act as an independent inspectorate. As such it is an unnecessary and expensive extra.

If the criticisms by the ERO of the old inspectorate, as quoted above, are justified, and they probably are, it is no argument against having an inspectorate, only an argument against having one of the previous kind. That the old inspectorate did not act like an inspectorate is no argument for not instituting a new New Zealand Schools Inspectorate which would genuinely inspect the schools.

I would suggest the ERO needs to be transformed into a small, effective body of inspectors, charged with investigating complaints and carrying out random inspections.

Special Education Service Board

"Special education" is a term now widely used throughout the western world to describe that different or extra education provision needed for children who have some kind of mental or physical handicap or learning difficulty, and such children are said to have special needs.

Often a child with a physical handicap can still be educated alongside "normal" children. A child confined to a wheelchair can still go to an ordinary school provided the school premises can accommodate the use of the wheelchair. More so than in years past, a child with a hearing difficulty can still be part of a normal class thanks to the provision of special hearing equipment between teacher and pupil. Children with speech difficulties may be catered for by having a speech therapist, but otherwise be taught in a normal school.

Children with very limited learning ability, or a mental handicap, may still be able to be taught in an ordinary school provided that such is not to the detriment either of that child, or the other children.

Children with such a severe handicap, physical or mental, that they cannot reasonably be educated alongside the rest of the children in ordinary schools, are educated in "special schools", be they schools for the deaf, the blind, the "maladjusted" or whatever.

Special Schools

The Picot report recommended that the new Ministry of Education should have no role in the provision of education. The Special Schools, like all other schools, should be given over to the boards of trustees. And just as with all other schools, the boards of trustees together with their principals would run that special school in the same way as any other school. Clearly the funding formula would have to be different, because it is much more costly per child to educate in a special school.

(Similarly, Picot recommended that the Correspondence School should be independently run by a board of trustees.)

Special Needs

For most of the children with special needs who are educated in normal schools, Picot recommended that by a procedure between the school, the parents, and the Ministry, each child's needs should be identified, the appropriate special education programme worked out, and then costed, and the Ministry make an extra or special grant to the school to cover that particular child's extra needs. That done, Picot recommended that the school should then be free to buy the services for that child's special needs.

Special Education Advisors

Special Education Advisors are all those persons catering for children with special needs, be they speech therapists, psychologists, teachers of the deaf, the blind, and so on.

Under the old system these Special Education Advisors were employed by the Department of Education. Under Picot's proposals it would be schools themselves who will employ, or buy in, their services as required. However Picot suggested that because such a free market in the special education services could be an uneven one, the Ministry should in effect pay a part of the cost of special education directly by paying a retainer to each special education professional.

Under the Education Act

In practice none of this has taken place under the Education Act, and all responsibilities have been clawed back to the centre. The Special Education Service Board has been set up under the Act (Part IV) and is responsible for all aspects of special education, both management and funding.

Schools who now find themselves with a child with special needs can hand over the problem to the Special Education Service, and the service has the monopoly of decision and provision as to what to do for that child. Even the parent, while consulted, has to accept the only special provision available.

There is no incentive to provide a cost-effective service, no incentive to find better and/or cheaper ways of making special provision, no incentive to try out new ways of assisting such children, and no competition to provide the best provision for children with special needs.

I find this incredible.

If it has been accepted by the politicians and the officials, albeit with increasing reluctance as I am seeking to show in this report, that the schools system would be far better under a devolved system of management, why should that small but nevertheless important section of the community, children with special needs, be excluded from such educational improvement?

If, on the other hand, it is argued that such decentralisation of management will not improve education provision, and thus the special schools and children with special needs have been excluded from the reforms, then of course the reforms ought not to be extended to the rest of the school population either.

The establishment of a Special Education Board is a step back to the old concept of central, monopoly control. I am sure that all those involved in the new service will do their best for the children concerned. I do not impugn their integrity or their professionalism for one moment, but the central, monopolistic system within which they have to work will not work to the best interests of the children.

The Special Schools should be independently managed as with all other schools, and a child with special needs should attract an extra per capita grant which the school, in consultation with the parents, can use to "buy-in" such services as are needed, whether from a government agency or from an independent private one, in order to make the best possible provision for that particular child.

Early Childhood Development Unit

The next of the agencies which effectively replace part of the Department of Education, is the Early Childhood Development Unit.

Part V of the Education Act treats early childhood education in the same way as special education, namely by setting up a central government board, the Early Childhood Development Unit Board.

While I have not examined in detail early childhood education in New Zealand, it seems to me that the same mistake has been made here, namely to suppose that early childhood provision cannot and will not be made unless a central government agency is set up to promote and control it.

On similar arguments to that on special education, such a board is not needed, and far from promoting better and more early childhood education, it could so easily become a bureaucratic straitjacket.

The General Advisory Service

The last in the list of five successor bodies to the Department of Education is the General Advisory Service. This is not, I am pleased to say, yet another centrally administered board. There is no mention in the Education Act of something called the General Advisory Service.

Under the term General Advisory Service are included all those advisors on education within the system, most of whom were formerly employed by the Education Boards, who have not finished up ~~as part of the Education Review Office, and who are not advisors on special education.~~ Neither are they, or were they, inspectors in any true meaning of the word.

The general advisors have now been attached to the teacher colleges, and each teacher college then makes an advisory service available to the schools in its area.

The cost of this is borne centrally by the Ministry. *Tomorrow's Schools* holds out the promise that after two years of operation the system might be changed to one of "full cost recovery". In other words the money to pay for the advisors would be included in the block grant to the schools, and the schools would then purchase, at full cost, the advisory service as they require it from the local teacher college.

In addition, some of these general advisors will be employed directly by the Ministry, under contract, to support particular curriculum initiatives.

In my view this particular reform is only part of the way there. It is necessary to reiterate that the ideal system is to devolve all responsibility and management to the boards of trustees, to the schools themselves, and then leave them free to purchase what they need out of their block grant.

The school board of trustees should be free to shop around the advisory services market.

If for example, the school needs professional advice on new and better software for the school computers, they should be free to purchase that advice from wherever best they can find it.

The computer advisor now attached to the local teacher college can offer to provide the service that the school needs, and the school could pay the college the appropriate fee for so many hours of advisory service.

On the other hand, the school might decide that the advisory service provided by one of the growing number of commercial companies in computer software is better value for money, and/or that the local polytechnic or university department is better placed to advise than the teacher college, whether or not the college is now affiliated to the polytechnic or university.

This is not yet the case. At the moment the board of trustees does not get the funding in the block grant to pay for such advisory services anyway and is forced, in practice, to use the same old advisors as before, now attached to the teacher colleges, and provided "free".

The education reforms should have gone the full way towards the buying and selling of such services, and not on a monopoly basis. As it is, it is a "free" but take it or leave it service, with only a promise that in two years time it might be changed to the kind of system that should have been set up in the first place.

Parent Advisory Council

The Parent Advisory Council (PAC) is established under Part VI and the Fourth Schedule of the Education Act.

Under that Act, all eight members of the PAC are appointed by the Minister, and the Minister also appoints the chairman or person "to preside" from that eight. The Minister can dismiss any member of the PAC for a number of reasons including neglect of duty or misconduct. The Minister appoints a new member to replace any vacancy.

Each of the eight members is appointed for a four year term and may be reappointed for a further four year term, and, at the Minister's discretion, for another four years after that.

The Minister is free to appoint at will, but is exhorted by the Act to reflect the early childhood, primary and secondary sectors of schooling; "the fact that approximately half the population of New Zealand is male and half female"; "the ethnic diversity of the New Zealand population"; and "the other diversities of New Zealand society".

The functions of the PAC are listed as follows:

- a) "To provide information about the school system, and the rights and obligations of people and bodies within and in relation to it;
- b) To help people and bodies who believe that their needs are not being acknowledged, or not being met, by the school system;
- c) To help parents, and promote their interests, in relation to the education of their children within the school system;
- d) To help parents who want their children to be educated outside the school system;
- e) To help parents who want to establish an early childhood institution for their children;
- f) To make general recommendations to the Minister, or any body operating in the school system, or on any matter of a kind described in any of paragraphs (b) to (e) of this sub-section and
- g) To report to the Minister on any educational matter the council thinks fit."

The council may only act under paragraphs (b) to (e) if requested to do so by parents, and only then after the parents have already exhausted the usual channels such as the appropriate Board or agency, or the Ministry itself.

The Education Act goes on at length to lay down the procedures the council is to follow in performing these functions, its powers (very limited) namely to "recommend", frequency of meetings, and so on.

A Parents Advocacy Council was proposed by Picot to "assist parents of compulsory age children who are unable to obtain satisfaction within existing arrangements" and Picot said "we also envisage that the Parents Advocacy Council will provide the kind of help and guidance to parents that is currently provided by the present departmental inspectors: it will not be appropriate for our proposed Review and Audit Agency to provide this kind of help".

Tomorrow's Schools repeated the PAC proposal in much the same terms, but also said, "The role of the Parent Advocacy Council will be one of 'last resort'. As such, it will be limited in its functions."

So the Parent Advocacy Council is entirely appointed by the Minister, is financed directly by the Ministry, is a complainant's "last resort", and has no power beyond publication and recommendation to put right any wrongs that it finds.

Do we need such a body? I think not. Does it add to the quality of education in New Zealand? I think not. Are there not more effective ways for the consumer's voice to be heard, listened to and acted upon? Undoubtedly yes.

If the reforms tentatively begun in Picot and not yet followed through, but which could still be followed through in the manner I suggest in Part IV of this report, did actually come about, then the parents and their children would be able to ensure that the suppliers or producers of education are obliged to comply with the wishes and needs of the customer.

A free, direct market, between supplier and consumer is the mechanism for the consumer's voice not only to be heard, but to be acted upon.

In the long run, therefore, assuming the complete freeing up of the system from politics and bureaucracy as I propose, there will be little use for the Parents Advocacy Council beyond that of another talking shop.

In the short run, though, with the present over-centralised system, might it yet have a role to play? Even then, my answer is still "no".

It is, after all, a Ministerially appointed board and not really independent although Picot and *Tomorrow's Schools* described it as such. By its very composition and financing it is not really going to be highly critical of the Minister, the Ministry, or one of the many centralised agencies set up under the Act.

Teacher Registration Board

The process of teacher registration and a Teacher Registration Board is established under Part X and the Seventh Schedule of the Education Act. It was proposed in the Picot Report and repeated in *Tomorrow's Schools*.

In essence, these sections and Section 65 of the Act, mean that a person may only teach in New Zealand schools if that person is registered by the Teacher Registration Board. Certain temporary exceptions to that rule may be permitted by the TRB where, for example, a vacancy is temporarily filled by a non-registered person because a registered teacher is not immediately available.

An opinion poll of the general public would probably show that most people think that teachers in schools should be properly qualified and should hold a certificate to prove they are qualified. They might go on to say that, after all, a medical doctor cannot practise without a professional qualification and neither can a lawyer.

In short, the public and parents want some kind of assurance that the people teaching their children are both competent to do so and are morally upright persons.

In my enquiries, therefore, there was at least superficial agreement that the TRB was necessary and was taking over the previous arrangements for qualified teacher status.

Looking a bit further, however, it is relevant to examine who appoints the TRB and what qualifications those persons have to approve the teachers; on what criteria will registration (and de-registration) be given; will it lead to a monopoly of teacher training and teacher qualification and reflect a particular view on what makes a good teacher.

There is a strong and respectable argument which says that the board of trustees of a school should be free to call for all the evidence they require as to the quality and competence of a person they are considering for appointment as a teacher and should be free to appoint a person on their own judgement.

There may be a technician, therefore, who was never formally trained as a teacher, but over the years has become an excellent teacher of young people in workshop practice but, at his or her age, is not now going to bother to go for a formal teacher's qualification.

There may be the excellent honours graduate who, during a probationary period as a teacher, has shown not only the knowledge of his or her subject, but the personality and technique that is necessary to teach that subject to children, even though that graduate has never received formal training as a teacher.

There may be that invaluable person with no formal qualifications who has that certain something to inspire, excite and retain the attention of a six or seven year old.

Are all these to be lost because they never went to teacher college?

The advocates of the TRB will say no, because the Board has the power to register such persons and give them a temporary, if not permanent, practising certificate if they, the TRB, judge that person may be exempted from obtaining a formal teacher qualification and thus be allowed to teach.

They may, after a long-winded bureaucratic process during which time the children are not being taught; and they may, for they see their task as upholding the continued need for teacher colleges, and for the kind of teacher training which those colleges give.

It could be that the school board of trustees are the best judge for their school as to who to appoint and who not.

Even if some kind of teacher qualification is desirable, and I can see the public assurance argument for it, this ought to be obtainable through a variety of routes and not just one.

For example, registered teacher status might be achieved by:

- subject qualification, teacher training qualification at a teacher college and two years teaching as a probationer, or
- subject qualification and two years teacher training "on the job" in school, under the supervision of an experienced teacher; or
- experience, expertise and knowledge of the subject (especially technical subjects) perhaps through years of work in commerce or industry, plus two years training "on the job" under the supervision of an experienced teacher.

My concern is that the TRB, of which the five voting members are all appointed by the Minister and its terms of reference and mode of operation is a direct arm of the Minister, applying the concepts of the government of the day as to what makes a good teacher and what constitutes good teacher training.

There is ample evidence that the training of teachers and the quality of the teacher colleges need considerable improvement. Evidence that criteria of racial equality, sex equality etc are too often more important than intellectual rigour and the ability to teach.

In the short term, therefore, I would retain the TRB as currently established. I would suggest that the board of trustees of schools should be free to appoint as teachers, persons that they consider appropriate to teach in their school, to the subject and age group required. And having appointed a person who is not yet registered (that is, does not hold a practising certificate), that person should automatically be granted registration by the TRB unless it can show firm, positive grounds as to why that person should not be registered.

Let it be assumed that the school's board of trustees judgement is correct, unless the TRB can prove otherwise.

In the longer term, other avenues for teaching teachers how to teach, not necessarily through the teacher colleges, need to be established and not necessarily by government but by the schools themselves.

I also suggest that the teachers should establish a reputable professional body (not a teachers' union) awarding its own certificates of qualification and, being a disciplinary body for the profession, analogous to those for doctors, lawyers, engineers and architects.

Even then, I suggest that such a professional body should not be given a legal monopoly. It should still be legal to teach without being a member of such a reputable association. What that professional body would need to do is to establish itself as being such a high quality reputable professional body that no self-respecting board of trustees would wish to appoint a teacher unless such a teacher had that professional qualification.

As matters stand, I fear that the TRB will be restrictive as to who may teach, and not always restrictive for the best professional reasons.

National Examinations and Qualifications Authority

The New Zealand government has set up the National Examinations and Qualifications Authority, NEQA.

An examination and a "qualification" associated with successful completion of that examination is worth no more and no less than the perceived quality of knowledge and expertise demonstrated by those persons gaining such a qualification.

In the previous section, I have already questioned whether the qualification gained at a teacher college is necessarily an acceptable standard for teaching children and whether there should be alternative routes to qualification which parents and pupils might recognise as being better than a qualification from a teacher college.

Let us take a few more examples to make my point that a qualification is worth no more than what experience shows that qualification really means.

Whether we like it or not, there is a pecking order of qualifications in the world.

Take a university degree. It is well known that a BA from certain world famous universities is accepted as denoting a certain high level of achievement. However, a BA from universities in some countries is looked on as being no better than the standard of a school leaving certificate, if that.

To be more precise, a first degree from many United States' universities is regarded in Britain as being little better than the British GCE A level taken at the age of 18 and certainly by no means equivalent to a degree from Oxford or Cambridge. This is borne not of snob value or misplaced nationalism, but experience of the graduates themselves.

To set up a new examinations and qualifications authority, merely because it is new and untried, risks throwing away the perceived standard and prestige of its established predecessors. This is not an argument for not setting up such an authority, especially if the predecessor authorities had lost public confidence. It is an argument for only setting one up if replacement of the previous arrangements has become necessary because previous arrangements had fallen into disrepute. This is not the case in New Zealand.

Despite the small size of New Zealand's population, it seems to be highly desirable for there to be at least two, if not more, independent providers of public examinations for schools and the

attendant qualifications, therefore creating competition and causing each to aspire to the best possible objective standards.

Many countries, however, have gone down the road of having one national government-appointed body to oversee a national qualification, creating a government monopoly in such a qualification, no competition in validating agencies and no objective standards upon which to judge the value of such qualifications.

Without criticising NEQA itself, I think it is wrong in principle to establish a single, government-sponsored national examinations authority.

The obvious providers of academic qualifications for schools examinations are the universities, with different universities establishing their own examining board. Schools and pupils would be free to choose whether they take the School Certificate of University A examining board or that of the examining board of University B, or another.

In New Zealand, it would probably be uneconomic for there to be more than two such examining boards attached to the universities. However, there is an additional option to increase the level of competition still further, namely to accept certain foreign examinations and qualifications in New Zealand, such as the London University School Certificate or, for the end of the sixth form and a suitable qualification for university entrance, the International Baccalaureate.

For vocational qualifications, it would be better for the independent professional bodies to be responsible for the appropriate qualifications.

~~In short, it is a high risk policy to set up a new, single, national, government-appointed monopoly for examinations and qualifications. It will take years before its standards are accepted nationally and internationally. If they are, it may never be so well accepted and achieve as high standards as if there were several competitive, national and foreign examinations available.~~

Assessment

A related subject is assessment.

The government appointed the Ministerial Working Party on Assessment for Better Learning under the chairmanship of Professor Sir James Stewart.

Since this paper was first written, the report of Sir James Stewart's working party has been published under the title *Tomorrow's Standards* and is reviewed in Appendix I to this paper.

The terms of reference for the working party were to:

- a) Recommend to the government procedures for assessment which:
 - i. Can monitor the effectiveness of the New Zealand school system on student learning;
 - ii. Assess the effect of individual schools on students' learning achievements;
- b) Recommend ways of reporting on the above, taking into account different audience needs;
- c) Within the context of New Zealand's dual cultural heritage, advise the government on the possible effects of such assessment in reporting procedures for students, teachers, the curriculum, schools, employers, and the wider community;
- d) As a preliminary step to making the final recommendations it shall prepare a public discussion document:
 - i. Outlining the main issues of assessment for better learning;
 - ii. Describing a range of models and procedures for assessment.

The working party also give their definitions of the terms used:

"**Assessment** is measuring or making professional observations on the extent or quality of performance. It can be used for two main purposes - to guide the development and improvement of the education process (for instance by identifying strengths and areas which require further attention) and to describe performance or achievement at a particular point in time."

"**Evaluation** involves making judgements about learning objectives using the information gained through assessment."

"**Monitoring** is overseeing and regularly reviewing standards of attainment and the effects and process of assessment."

"**Effectiveness** is the level of success achieved in meeting goals and objectives. This is different from efficiency, which has more of an economic meaning, measuring the inputs and costs, as well as outputs."

To fulfil the further term of reference quoted above and to prepare a public discussion document, the working party produced the document *Assessment for Better Learning* which was published by the Department of Education in 1989. Within that document is a four page pull-out response sheet to be completed by the recipient of the book and returned to the working party. Anyone with something to say about assessment in education was invited to reply to that working party.

Guided by the public response to this document, the working party were charged to make a final report to the Minister early in 1990.

While this "public document" invites responses from the public, it does give a very strong steer as to what response the working party is looking for. Indeed I will go so far as to say that the tone and much of the content of the final report to the Minister has already been set by the tone of the public discussion document already published.

It reflects a very different approach to assessment to my own, and clearly fights shy of the idea that some young people are brighter than others, will achieve more than others and are more likely to go on to tertiary education than others. Similarly it seems reluctant to concede that some children will not achieve a great deal academically (they may in other skills and pursuits) and that such children will need to concentrate on the "basics" with little time for much else.

As the discussion document rightly points out, the present working party on assessment is another in a long line of government-appointed commissions to look into the subject, stretching back almost 30 years to the Currie Commission Report of 1962. The most recent of these was the Royal Commission on Social Policy of 1988 which, among other things, recommended the removal of the School Certificate and was concerned with "fairness".

The present working party begins to give a hint of its approach right from the start in the introduction to the document:

"We can look at the effects of various programmes. However New Zealand always risks disappointment if it draws conclusions from other countries and does not take note of the differences in the respective education systems. Our system is different in many ways. Children are allowed to enter school on their fifth birthday, but they don't have to enter until they are 6. An increasing number of Maori children stay in Kohanga Reo until their sixth birthday. We have a high proportion of small rural schools. Compared with other OECD countries we do not have as many students at senior secondary or tertiary levels. We do not have a large private school sector which is markedly superior to the state school system. These are significant differences that must be taken into account when recommending any assessment procedures."

I suggest that these "differences" are not so great as all that, and that the similarity of New Zealand's culture and education to that of other OECD countries, and especially to other English speaking countries, is very much greater than the differences.

I detect in this opening statement a warning shot that, as far as they are concerned, New Zealand is not prepared to learn from either the mistakes or the successes of education reforms in other countries.

Heavy emphasis in the document is given to "our dual cultural heritage and special features of education in New Zealand". This colours much of what the working party is looking for by way of assessment. On page eight of the document they ask a number of questions, some of which seem to be rhetorical rather than really wanting an answer, and others seem to be the wrong questions anyway.

"Should we focus on comparing students?" (their words). Clearly they think not.

"Should assessment be used for sorting students?" (their words). Again, clearly they think not.

"How useful are numbers or grades in describing students' achievements?" They don't think so.

"How can we ensure the Maori view of learning is reflected in assessment procedures?" Clearly, they believe it should be.

"Must so many Maori students fail?" No, of course not, but the remedy is for more effective teaching not, as the document implies, by moving the goal posts so that they don't fail.

"How can we ensure that students from non-English speaking backgrounds are assessed fairly?" The short answer is by teaching them English more effectively.

The document goes on to emphasise the truism that public examinations such as School Certificate, University Bursary and Entrance Scholarship measure the achievements of young people relative to each other and not necessarily absolute standards.

Governments throughout the OECD countries have been chasing this mirage of "objective" rather than "subjective" standards in examinations. Insofar as standards of achievement are set by people other than those taking the examination, the standards sought are necessarily subjective. If the only measure of achievement is above or below some average, the results are subjective rather than objective.

Certainly there is merit in trying to make the examinations as objective as possible, so that "2 multiplied by 2 equals 4" gets full marks regardless of how many other candidates get it right, and certainly in mathematics and the sciences it is easier to set objective standards of achievement.

It is inevitably much more subjective to assess a good essay, but that does not mean we should not do so and does not mean that we should mark the essays up when we get a crop of poor ones and mark them down when the standard is good.

It is valuable to note that one student did better than another in, for example, chemistry, and, therefore, that this student is more likely (assuming the examinations are properly set and marked) to go on further in the subject of chemistry than other students.

Nevertheless, the document is right when it says "there can be no assurance that similar marks in different years mean similar standards of performance" (my emphasis).

Their conclusion, however, is "thus, our current external examinations do not seem to be particularly suitable for maintaining standards". That does not follow at all. It could well be, indeed it is highly likely, that the external public examination, School Certificate, imperfect though it may be, is still an effective target, an effective hurdle if you like, encouraging both students and their teachers toward higher standards, and towards maintaining higher standards.

The working party, in this public document, clearly does not like having to sort students. Some of us can obtain a degree in mathematics or science and others can not. It simply makes sense to sort out those that can from those whose aptitudes and abilities lie elsewhere.

The document asks "even if we want to sort students, does this mean that we have to fail some?". Yes it does and it is silly to pretend otherwise. But the document proudly goes on to describe the recent changes to School Certificate: "now, however, the pass or fail distinction in School Certificate has been removed and University Entrance has been replaced by Sixth Form Certificate. Both of these awards provide students with grades which indicate their level of achievement. Nobody receives a fail grade".

Who is kidding whom? Whether we call it grades 1, 2, 3 and 4 or A, B, C and D, or 100%, 80%, 60% and 40%, people are not silly and are entitled to regard a score above a certain grade as a pass and below, a fail. They are entitled to say that too low a grade, a fail, disqualifies the student from pursuing more advanced work in that subject.

The document claims: "Although marks or grades can be useful on occasions... for most of the curriculum, achievement is more meaningfully described in words".

Whether this is true is arguable. Words, however, are just as susceptible to misinterpretation as grades and written descriptions will be used like grades to pass and fail students.

The document devotes a fair amount of space to concern for and about the Maori people. I share their concerns, but not their remedies. I shall return to the subject under the heading of *Maori and the Treaty of Waitangi* later.

The working party cites examples that it is not always easy to obtain accurate assessments of students with disabilities. Quite so, but this is no argument for not assessing such students, even if with difficulty, and no argument for not assessing the rest of the students without disabilities.

In pursuing this argument, the document gives a silly example:

"For example, if the test requires written responses, this may make it harder for the visually impaired".

We all know that, even more so with modern visual and audio equipment, examination boards can and do accommodate candidates with physical disabilities.

Just as bad as the working party's wish to move the goal posts to accommodate the Maori, rather than to raise the level of education so they can meet the required standards as well as anyone, is their approach to children who have little or no command of the English language. The solution is to concentrate, to make greater effort, to teach those children competence in English, not to give them a false assessment as if lack of knowledge of English in New Zealand did not matter. If we "compensate for lack of fluency in English" as the document proposes in making the assessment, we do not help the student at all. We only postpone the day, until it is too late, when the student finds out that his or her lack of fluency in English is a handicap in New Zealand adult society.

I feel very strongly that children from families where English is not their first language need extra special help to achieve competence in English. This is not to denigrate their own home language. It is to assert that they need competence in English if they are to live and work happily and successfully in an English speaking society. Without English we condemn them to become "second class citizens".

This is true not only for New Zealand, but for Britain, United States, Australia or Canada where non-English speaking minorities, whether indigenous or as a result of immigration, have chosen to live within an English speaking society.

There is much more in the "public discussion document" which alarms me. It seems to be trying to persuade New Zealanders to accept lower standards of achievement for their children and lower standards than other countries on the spurious grounds that New Zealand is unique and has many "special problems".

Repeating this assertion the document on page 39 states:

"There is considerable effort now being expended internationally to develop useful educational indicators. While we may benefit from the efforts of others, it is important to recognise that our education system is unique, and therefore that many of the issues that we wish to examine may not have direct counterparts in other countries. Often, the most useful information will emerge from indications which have been carefully developed to meet current local policy needs".

I am pleased to say that New Zealand is not as unique as all that. It is in the mainstream of the advanced nations on the world, culturally, educationally and economically. It ought to stay there, and it won't if it isolates itself within its own set of assessment indicators to meet "current local policy needs".

While it may make sense to improve the continuing assessments that teachers make of children to monitor their progress and adapt the teaching to ensure continued progress, there is no substitute for **clear-cut, external public examinations**, with clear grades awarded for achievement demonstrated by the candidate in the examination.

Such examinations not only "sort out" students for their further studies and future careers, but also serve as targets and incentives in themselves for both students and teachers. This ensures that schools continue to strive for high academic results as well as all other benefits expected from a good all-round education.

The assessment working party, I am pleased to say, concedes that the University Bursary and Entrance Scholarship examinations should continue in New Zealand, saying

"The working party proposes that these national awards should continue for the foreseeable future. The awards have a direct relevance to entry to university for the majority of students and are also widely used for admission to other tertiary institutions. It is our view that for the minority of students remaining to complete a seventh form year, it is appropriate to offer them examinations in content and skills directly related to tertiary education".

I propose that a similar competitive external examination should be restored for the end of the period of compulsory schooling, that is for those aged approximately 15 years, with grades, and with pass and fail. However, it should not be compulsory for all such young people to take that examination. For many youngsters an academic examination may well be inappropriate.

By all means have a School Leaving Certificate as proposed by the working party, recording achievement at the school over the years, but it is no substitute for the old School Certificate.

I suggest that those children seeking to pursue more academic studies from the age of 13 to 18 do so at secondary schools specifically geared towards educating the top ability band of children, rather than catering for the generality of children. It is then appropriate to have public external examinations at the age of 12/13 and such overt selection is far better than the covert selection that I have observed in some New Zealand secondary schools.

This whole concept of proper assessment, public examinations and attendant qualifications is vitally important for New Zealand education.

Standards need to be set high. External examinations are necessary and internal assessment is part of the teaching process, but it is no substitute for external assessment.

I fear that the wrong criteria of assessment are being proposed for New Zealand with "fairness", "equity", "lack of failure" and such well-meaning but nevertheless dangerous concepts being proposed.

I fear that the educational establishment in New Zealand is unwilling to stand comparison with achievements in other advanced countries, finding spurious reasons why, in the case of New Zealand, such comparisons are invalid.

I have no reason to suppose that New Zealand schools could not compete successfully both within New Zealand and internationally, to achieve the highest standards of achievement of their students. But unless they are exposed to the winds of competition and comparison of standards, they will not succeed.

National Library

National Film Library

Correspondence School

School Publications

Rural Education Activities Programme

I have not studied in detail these agencies which remain part of the centralised structure of New Zealand education, and so will not comment in detail on them.

I did pick up some very positive support for them during my travels in New Zealand, not least for the Correspondence School which users consider did a good job.

What I would say in all of this, however, repeating earlier themes, is that such government agencies should not necessarily have the monopoly. Their services should be properly costed and the users of the service should purchase, from their budgets, such services according to their judgment of their worth. In short, it should be open to private, non-governmental agencies to compete.

A simple example is the school library service. It may be that this is most economically provided by the National Library acting as a central agency. A school should, however, have included in its block grant a notional figure to cover its school library service needs and should then have the freedom to use the National School Library Service if it wishes, but also any other such service that a private enterprise might offer.

School Transport

Many countries provide special transport, sometimes subsidised, so that children may more readily attend school.

New Zealand like many other countries has a rural population where distances to school are greater than for children in urban areas and where public transport is less frequent or non-existent. Thus school transport is important.

In our effort to ensure that every child has the opportunity to be educated at school and, better still, has a choice of school wherever possible, special school transport to supplement both private and public transport is an accepted necessity.

That still leaves it open to discussion who best provides such transport and who should pay for it.

Before the Education Act 1989, authority for the provision of school transport assistance in New Zealand rested upon the provision of Section 201B of the Education Act 1964. That said that the Director-General of Education "shall out of such money as may from time to time be appropriated by Parliament for the purpose provide such school transport assistance as he thinks necessary".

While the law provided that assistance on school transport can be given out of public money, it left it entirely to the Minister to decide what and how much school transport assistance and who was to be entitled to it. Such school transport policy has thus not been covered by any Education Act and

not by any regulations issued under any Education Act. It has, in fact, been covered by "administrative instruction" under the Department of Education's Administration Manual.

Given the new Education Act 1989, school transport is now under review and officials of the Ministry of Education have been directed to report to the Cabinet Social Equity Committee on "policy proposals for the long-term reorganisation of school transport".

Under the old regime, pupils were entitled to school transport assistance if they were:

- under 10 years of age and lived more than 3.2 kilometres from the nearest state school ; or
- 10 years or older and lived more than 4.8 kilometres from the nearest state school.

Although the expression is "nearest state school", it presumably means nearest appropriate state school. In other words for a secondary aged child, the nearest state secondary school.

Such school transport assistance was channelled through the old Education Boards, who were authorised to establish daily school bus services within certain financial limits. This was often done by the education board entering into a contract with a school bus contractor.

It has now been agreed on the recommendation of the "implementation unit working group on school transport" that, for the future, the basic eligibility rights of pupils to assistance with school transport should be covered by appropriate regulation under the Act.

It was also agreed that existing contracts between the bus contractors and education boards should pass over to the Ministry of Education on 1 October 1989, on the demise of the old Education Boards and upon establishment of the new Ministry of Education.

It was also agreed that school transport should become a Ministry of Education responsibility throughout New Zealand.

It was suggested that the old figures of 3.2 kilometres for under 10 years old and 4.8 kilometres for 10 years and older should be retained as qualifying a pupil for transport assistance, provided the pupil does not have satisfactory access to public transport at concessionary rates.

A new qualification for school transport assistance was also proposed, namely that the child should not, in using public transport, have to walk further than 1.6 kilometres between home and the bus stop, or between school and the bus stop. Another proposal is that even if there is public transport, if the time tabling is too inconvenient, assistance should still be given. Too inconvenient was defined as a wait of 45 minutes or more before or after school and a total time away from home of more than nine-and-a-half hours.

I suggest that school transport should not be administered by the Ministry of Education. It is more likely to be effective and more economical if administered locally by the board of trustees of each school or a consortium of boards of trustees of local schools.

I suggest that the board of trustees of the school should have the freedom to provide as much, or as little, school transport as they think fit, provided that they at least cater for the minimum eligibility for assisting pupils as laid down in national guidelines.

I suggest that the block grant to the school's board of trustees should include a notional figure to cover school transport, calculated on some clear formula for the number of children and their geographical spread. Within that budget, the school should be free to make such provision as is best and economical. This might involve signing a contract with a local company for a special bus service; or arranging for subsidised fares on public transport; or arranging public transport to extend its route to cover certain children; or the school itself running its own mini bus service, or whatever system the board of trustees considers appropriate.

I suggest that all parents should have to cover the cost of the first 3.2 kilometres for an under 10-year-old child and 4.8 kilometres for a 10-year-old and over. And that any subsidy, from being

partially to totally free, should cover only provision in excess of those distances. There is no case for having no subsidy at 3.2 kilometres and yet a total subsidy at 3.3 kilometres.

It is open to the government to fund a total subsidy for all children travelling in excess of those statutory distances, provided that they give the school boards the money to do it, but I see no reason why there should be such a blanket subsidy.

I would rather a system of transport be provided at cost and any subsidy given to an individual child on the basis of the family's ability to pay.

Whatever the eventual rules adopted, and the terms of eligibility for assistance, I believe that the management of school transport is best done by the schools themselves, or where appropriate by a consortium of schools, rather than centrally by the Ministry in Wellington.

Maori and the Treaty of Waitangi

This year, 1990, sees the 150th anniversary of signing the Treaty of Waitangi.

It is outside my brief to comment on property rights, land purchases or deals our ancestors made, but it is quite outside the terms of the Treaty of Waitangi to pretend that the Treaty covered language, culture, history, today's school curriculum and whether all children ought to learn Maori.

The Treaty of Waitangi has been wrongly invoked in aid in support of all kinds of peculiar curriculum innovations in an attempt to justify such impositions from the centre. This is no help to anyone, least of all to Maori.

Despite three waves of immigration, we now have one nation where the dominant culture, traditions and custom are of British descent. Within this nation, there are minorities from a variety of ancestries, some of whom have retained all or part of the language and culture of those ancestors. The most important, numerically, is Maori.

Certain truths follow from all of this as far as education is concerned and particularly as far as what we teach children in the schools.

What is relevant to education today is the fact that New Zealand is now a multi-cultural democratic nation where the dominant culture and language is spoken and written English. That is true regardless of the ancestry of the New Zealander speaking it.

It follows that all children, whether they are Maori, Cook Islander, Japanese, Chinese or Fijian, should be taught to read, write, speak and understand good English.

If this is not done, or not done well, then that child risks growing up to become a second-class citizen in New Zealand, unable to communicate effectively, unable to understand all around, and quite possibly as a result, unable to hold down a worthwhile job.

Taonga - the Maori Language

Sir James Henare is quoted as saying:

"Therefore the Taonga, our Maori language as far as our people are concerned, is the very soul of the Maori people. What profit to the Maori if we lose our language and lose our soul, even if we gain the world?"

It is right and understandable that Maori speaking people should wish to pass on to their children the Maori language and to do so from the moment the child is born, through family life, including the extended family.

It is right that the state education system should facilitate the continued learning of Maori throughout the Maori child's time at school, but always as well as, and, not instead of, English.

It follows from what I have said earlier in this section that such Maori children must also be taught good English, and we fail them if we do not do so. It does not follow that all non-Maori have to learn the Maori language. They may wish to do so, but they certainly should not be compelled to do so.

Yes, this is an unequal situation - the Maori must learn English, English speakers need not learn Maori. The history of the development of New Zealand explains why. It is dishonest, as some of the education reform documents claim, to suggest that the English and Maori languages are of equal stature, equal worth and equal standing. This is patently not true.

English is the dominant language in New Zealand. It is the language of communication between all people in New Zealand and anyone living in New Zealand who cannot speak and understand English well is automatically at a disadvantage.

The same is not true of Maori.

A bonus, of course, is that English has also become the dominant language of communication throughout the world, and thus English speakers find themselves at a considerable advantage compared to those who have to learn English as their second language.

The same is not true of Maori.

English is also the language with perhaps the richest vocabulary in the world. You can express a thought, an idea, in English with far greater precision and with all the nuances that you care to give it, than you can in virtually any other language.

The same is not true of Maori.

In many ways it seems that Maori within English speaking New Zealand is similar to the situation of Welsh within English speaking Britain. Both have close association with the native culture; both are poetical, beautiful languages, ideal for expressing romance and emotion; both are imprecise and of limited vocabulary, no good for science, mathematics, technology, law, or any form of precise expression.

It seems to me that too many involved with the current education reforms know the truth of what I say, but have not the courage to say it for fear of upsetting Maori sensitivity.

I have to tell them that Maori themselves should not thank them for such misplaced sensitivity. They want their children to succeed and to compete effectively in New Zealand as well as any other and they know that competence in English, not Maori, is a prerequisite of that.

The more educated Maori are, the more they recognise that they can and they will teach their own children Maori, and what they want the state schools to do is to teach them good English and all the other subjects necessary in modern New Zealand society.

Culture and History

Many cultures and histories have come together to form modern New Zealand. It is arrogant of New Zealanders of both British and Maori descent to deny and ignore the culture and history of the many other ethnic minorities in New Zealand.

While the two major cultures are British and Maori, they should not be looked upon as "British" and "Maori" but as a blend which forms New Zealand culture.

It is right, therefore, that New Zealand schools should teach the history of the Maori people to all children. It is right also to teach British, European and New Zealand history to all children. It is increasingly right to teach all children throughout the world a better knowledge and understanding of world history.

It is right for those Maori who wish to pursue in greater depth and understanding their Maori language, culture and traditions, whether informally, or formally in Maori schools, to do so.

It is not right to impose greater time and effort on matters Maori on all New Zealanders, particularly when it is at the expense of other more important areas of the curriculum.

Bilingual Teaching

There is a popular education fallacy that to teach a child all subjects in that child's home, family language, in some way enhances that child's ability and competence in the different, majority language of the nation.

There is an element of truth in the assertion that recognition and respect, and better still some knowledge on the part of the teacher, for the child's home (usually maternal) language, greatly enhances the child's confidence and self respect. Some, however, even doubt that assertion. A study by the American Institute for Research (AIR) in 1978, found "no support for the popular belief that children taught in their native language develop a more positive self-image than those who are not".

More importantly, teaching in the native language can actually put the minority child at a severe disadvantage. This subject has been exhaustively researched in the United States, where Spanish is the principal minority language in English speaking America. The phrase Limited English Proficient (LEP) has been coined to describe students not fully competent in English. According to Christine Rossell, an expert in research in social sciences, "transitional bilingual education is not the most effective method of teaching LEP students English, or helping them with academic achievement. In fact, there is no consistent research support for transitional bilingual education as a superior instructional practice for improving the English language achievement of LEP children".

An excellent paper referenced below by Dr Gerda Bikales (herself an immigrant who had to learn English) summarises this evidence. It is taken largely from the point of view of teaching Mexican and other Hispanic Americans, but is nevertheless of considerable relevance to the issues of Maori education in English speaking New Zealand.

At the very best, bilingual teaching does not help the child; at worst it can be counter-productive and damaging. There is certainly no case for imposing bilingual education into the New Zealand curriculum.

The School Charter

The Charter imposed upon all schools (see earlier) includes the paragraph:

"Treaty of Waitangi

The board of trustees accepts an obligation to develop policies and practices which reflect New Zealand's dual cultural heritage".

This is not what the Treaty of Waitangi was about and it should not be interpreted, as some officials are attempting to do, to mean that Maori language and culture has to be taught to all children in all schools.

If the paragraph is there to exhort respect and tolerance, then it is an affront to every self respecting teacher, for it does not need to be spelled out in a legal document. If it is there as an obligation to teach Maori to all children, then it is wrong.

That paragraph should not be in the Charter at all.

Assessment

I have already questioned the basis upon which the current "assessment" exercise has been carried out.

A major section of the public discussion document *Assessment for Better Learning* is devoted to Maori. We are invited to answer the question "How can we ensure the Maori view of learning is reflected in assessment procedures?" The answer which the working party gives us is that assessment procedures for all New Zealand children should accommodate what the working party assert is the Maori view of learning. We are told for example that "the mismatch between Maori values and current practices in secondary schools is obvious" and "the negative outcomes of this system are borne heavily by the Maori people". "The developmental, child-centred approach promoted at the primary level, however, goes a long way towards catering for Maori values and learning styles."

We are also told "there is emphasis on the concept of whanau or group involvement, individuality being taken for granted". I have to say that individuality cannot be taken for granted and that there is a grave risk of curtailing individual freedom, individual potential and individual learning capacity by subsuming it all into something called group values. The paper goes on "the current moves to Maori self-determination extend to the right of Maori people to define their own learning needs".

Further questions posed are:

"In terms of equity, what kind of assessment measures would ensure that the Maori student achieves excellence in Maori education?"

"What kind of assessment and evaluation would ensure the Maori student is not disadvantaged when striving for excellence in Pakeha education?"

The answers to these and similar questions are surely that those Maori who so wish it, should be entitled to pursue their own concept of education, learning and assessment. They are not entitled to impose those views upon the majority of New Zealanders just as much as the majority of New Zealanders should not seek to impose their "western" approach on Maori.

There are also many Maori who do want their children to learn and to succeed within the Western style education system, assessed on what they have learned and what they can do, assessed in terms of degrees of success and failure and they too should not be subject to what amounts to a group of officials' views of what Maori want.

This means that if Maori education and the Maori approach to assessment and evaluation is so different to "Pakeha" education, then those Maori who wish it are entitled to have their own schools, their own education system and their own assessment procedures. It does not mean that the measures of excellence which the Pakeha population recognise and strive for have to be altered.

This approach of never-can-fail, "mastery of one's total self", no absolute standards, egalitarianism is very worrying and is not likely to lead to higher standards in New Zealand education, but rather the reverse. To clothe it in respectability by asserting that it has to be done to accommodate Maori is wrong.

EQUITY

Equity is almost a code word in New Zealand education circles and under its label almost any policy is justified and given respectability "for the sake of equity....".

Equity seems to mean whatever the speaker wants it to mean; equality of input, equality of outcome, fairness, egalitarianism, equal opportunity or unequal opportunity.

"Unequal opportunity?" you may ask. Yes, even that, for in the name of equity some seem to think that bright children should not be permitted to outshine less able ones. In other words, should be given less opportunity for fear they might make more use of it.

This term equity and peculiar interpretations of it have adversely coloured the education reforms and related documentation.

This confusion over equity is well exemplified in the Charter Framework, the draft Charter which the government is attempting to impose upon all schools (see earlier in this report).

Under the heading of "other principles" and the sub-heading "equity", boards of trustees have to commit themselves to:

"The board of trustees accepts that equity objectives underpin all activities at school".

What are equity objectives? And underpinning all achievements in the school?
The charter framework goes on to explain:

"The board of trustees will ensure that this school's policies and practices seek to achieve equitable outcomes for students of both sexes, for rural and urban students, for students from all religions, ethnic, cultural, social, family and class backgrounds, and for all students irrespective of their ability or disability".

That can only mean that the students of the school, regardless of their ability or disability; of the advantages or disadvantages they bring with them from family and background, should finish up achieving no more nor no less of each other. The outcome, the achievement of their schooling, should be equivalent one child to another. None should be allowed to succeed more than another.

Such is a disastrous recipe for mediocrity.

The pace of the fastest must be restrained to be no more than that of the slowest. The child with a highly supportive family must not be permitted to achieve more than the child from an uncaring home.

This requirement in the schools' charter for "equitable outcome" is extremely dangerous and should be totally ignored.

Having made such a silly statement, however, the charter framework then goes on apparently to contradict it, but regrettably does not quite do so.

It goes on,

"Two aspects of equity are:

Equal Educational Opportunity

"The aim will be to ensure equal opportunity for all students to participate and succeed in the full range of school activities.

"The board of trustees will adopt policies and practices that identify and cater for the needs of each student in the school. These will affect the school's curriculum and the way the school distributes resources."

That's not bad; as a school trustee I could just about interpret that as meaning that every student should be given every opportunity to succeed at whatever they are good at, and to try all kinds of pursuits and activities at the school.

If we do that, as indeed we must, then of course it will not lead to equity of outcome but the very reverse.

Give the dull, lazy child every opportunity and the child will still achieve little, but little is better than nothing.

Give the bright, diligent, enthusiastic child every opportunity and the sky's the limit, the tallest of poppies will result.

Just to bring you back to earth, however, the charter's second item on equity says:-

"They will include programmes that redress existing inequities and address the current and future needs of students, particularly:

Maori	Women and girls
Pacific Island	Students with disabilities
Other ethnic groups	Students with other special learning needs

That is good, old-fashioned, socialist, social engineering.

School is about educating children, or should be.

I could go on with examples of peculiar concepts of "equity" from other documents in the current education reforms, but to do so would be only to labour the point.

Let us just resolve to give every New Zealand child the equal opportunity to finish up unequal, according to that child's diligence, aptitudes, and abilities.

STANDARDS

The term "standards" is another one which can mean what you want it to.

By "standards" here, I mean standards of achievement of the students. I mean measures of what they know and what they can do.

I have already heavily criticised the current proposals for watering down "assessment" so that everyone wins. Messing about with the School Certificate, and the rest of them, will mean no valid assessment of standards and no incentive to achieve them anyway.

Standards, of course, means not only standards of achievement in the conventional subjects taken at School Certificate, and beyond. It also means standards achieved in the primary schools. It means standards of literacy and numeracy at 6 and 7 and 8 years old.

There seems to be no comprehensive and comprehensible measure of such New Zealand standards, neither comparisons between children and between schools within New Zealand, nor comparisons of New Zealand achievement vis-a-vis the rest of the world.

It would indeed be a most valuable, and possibly most salutary, exercise to assess and compare standards of achievement of New Zealand children over recent years. There is already published data for most of the OECD countries, including New Zealand, but this needs to be handled carefully in order to be sure to be comparing like with like, country to country, subject to subject, age group to age group. Such would also need to be supplemented by at least sample surveys to update the available data for New Zealand.

However, it is possible to gain some firm impressions both from the literature and from discussing the matter with those in New Zealand education. Compared to the "third world" countries, compared to many of the Pacific basin countries, New Zealand is doing very well educationally. But I imagine that New Zealand would wish to be compared with the top-most, culturally and economically, countries of the world which, in practice, means the OECD countries.

Here we find, for example, that in numeracy Japan is way ahead at all ages up to, but excluding tertiary education. We find the Netherlands and Germany towards the top of the league table, Britain middling, New Zealand poor, USA not too good either. That is the kind of pattern that seems to emerge, but I am necessarily cautious until a proper study is made of all of this.

New Zealand should not be poor in numeracy, none of us should be, such is a handicap in the development of science and engineering in particular in our countries. New Zealand seems to be even weaker in science.

Literacy in New Zealand seems to be better than numeracy, but literacy is, of its nature, less easy to measure with any accuracy. In reading ability (part of literacy) I had the impression that amongst those in New Zealand education there was an unwarranted complacency at the levels achieved especially in the primary schools. I believe that most children should and could be reading well before the age of 7 years, but I found such a comment was greeted with disbelief and disdain.

Within New Zealand there are clearly wide differences of achievement. There are certain, few, secondary schools which aspire to high standards and on the whole achieve them. Even they, however, would benefit from harsh comparison with similar schools elsewhere in the world. There are many other secondary schools which, in my view, ought to achieve more with the children, and they do not.

Of course, such statements as the above will be greeted by comments such as the different intake of students must be taken into account, reflecting the different social classes represented, different areas or zones, different ethnic backgrounds of the children. It will be said that "value added" should be assessed, not absolute standards.

All of that may well be useful in planning how best to achieve more with certain children in certain circumstances, but such does not mask the fact that some schools set themselves and achieve high standards, and others do not, even with the same kinds of children. One of the great problems in education today, and by no means confined to New Zealand, is the low expectations teachers have of the children they have in their charge. Expect little and you will get little, expect a lot and you will probably get much. Overall, I detected an unjustified complacency in New Zealand amongst those in education; an unwillingness to be compared to each other, let alone to the world outside; a contentment with a kind of "middle-of-the-road", "not-too-bad" level of achievement; a belief that it's better to have standard even if low levels of achievement rather than enabling the most able to outshine the rest of us; the tall poppy syndrome.

This is one area, standards, where further study would be justified and could be rewarding in encouraging a pursuit for higher standards in New Zealand.

NATIONAL CURRICULUM

The Department of Education published a "national curriculum statement", "a discussion document for primary and secondary schools", which was described as being a "draft statement".

The "curriculum" means what we teach the children, and a "national curriculum" implies that such should be uniform and nationally laid down.

This particular document is much better than some.

In the introduction it says:-

"This draft statement suggests a broad general framework for the curriculum for students in New Zealand schools."

Notice "broad general framework"; that would be fair enough, provided it is not a detailed menu imposed by the bureaucracy.

The document goes on:-

"The purpose of this draft national curriculum is to help schools to provide all young people in New Zealand with an education that encourages them to strive to reach their personal best." (Even presumably, encourages them to outshine if they can.)

The same publication however drops back to the old code words,

- "promote a sense of cultural identity"
- "work towards a fair share for all"
- "provide a broad and balanced education".

These have become codes of the egalitarian lobby. "Broad and balanced" is an expression which sounds fine, but actually means do everything, but nothing to any depth.

The document goes on to give the Curriculum Review Action Unit's definition of curriculum, or rather four possible uses of the term:

- "At the national level, a national curriculum statement would show, in general terms, what is expected of all schools in New Zealand. It would show the elements that should be present in school programmes, and provide a framework for programme planning."
- "A school's curriculum shows how a school plans to put into practice the advice of the national curriculum statement. It takes account of local needs, priorities, and resources, and sets out the learning experiences through which students can develop the knowledge, skills, attitudes, and values suggested by the national curriculum. Designing it will involve wide-ranging consultation with the school's community."
- "The curriculum in action is what is actually taught. It consists of the class programmes of studies and activities developed by teachers to meet the learning needs of their students. These programmes are based on the school's curriculum."
- "What each student has learned is a fourth meaning of the term curriculum. By assessing each student's progress, teachers and parents can obtain a measure of the effectiveness of teaching and learning. Using this information, a school's curriculum, and its class programmes of studies and activities, can continue to be modified in order to enhance learning."

If we stick to that and go no further, I agree with them. By all means have a general statement which sets down on paper what New Zealand parents, and society, expect our schools to teach.

In layman's terms such would probably be the 3 R's, reading, writing and arithmetic, or the same thing in today's jargon, literacy and numeracy; two more R's, right and wrong, in other words moral values; understanding of the history and culture of New Zealand, including nations and peoples from which New Zealand has developed. These days the layman would probably add a knowledge and understanding of science and technology, and I hope he would also add an appreciation of the arts, a knowledge of at least one modern foreign language, and knowledge of geography.

I suggest we stop there and leave it to the professionalism of the teachers and the individual preferences of parents as to the greater detail of a particular child's curriculum.

For example, harking back to my previous comments, if a child has extreme difficulty with the English language, such must be concentrated upon even, at the expense, if necessary, of other desirable areas of the curriculum.

The risk is that New Zealand will go down the road which England and Wales, and separately Scotland, have embarked upon, which in my view has been and continues to be a grave mistake.

Not content with a general statement of the kind described above, the British Education Reform Act of 1988 spelled out three "core subjects" (English, mathematics and science) and seven further "foundation subjects".

Not content with that, committees have been charged with defining in great detail what exactly is to be taught and at what age, under the heading of English, mathematics, geography, history and so on.

Such committees will tell us whether or not they think children should be taught to spell, punctuation, grammar, poetry or literature. What they think goes, because the Secretary of State has taken the power to impose such a defined curriculum on the state schools.

New Zealand, I trust, will not make the same mistake. They risk doing so, not under the heading of this section "national curriculum", but under that of "assessment". The two are intimately related. If the government sets in detail what and how and upon what criteria, skills and knowledge are to be assessed, then inevitably they also set what skills and knowledge is to be taught in the curriculum.

Even this 1988 consultative document in New Zealand of the National Curriculum, having started off reasonably well, soon starts all the alarm bells ringing in my ears.

With their teachers, the students themselves "should be involved in setting roles, planning their activities, organising their studies to gain skills and understanding, and evaluating their progress".

"Each school's curriculum should recognise the status of Maori as Tangata Whenua and acknowledge the nature of the partnership established by the signing of the Treaty of Waitangi."

I have already commented that such is only appropriate for those Maori that wish it, not for the generality of all children. Indeed having so explained in the document the pride of place that should be given to the Maori language and culture for all students, almost as an afterthought, the document goes on "at the same time, the curriculum should respect the contribution made by Western traditions to the development of New Zealand society, and the values derived from them that underlie our way of life".

If we go on we find the curriculum should "promote equity", "be sure it is non-sexist", "a balanced education", the curriculum should be "co-operatively designed".

Having read so many similar documents in other countries, it is the same old jargon and the same old hidden meaning, lacking any intellectual rigour.

The document redeems itself a little in my eyes when it says

"English is the common language of communication in New Zealand: all students must develop fluency in English and confidence in its use".

Although we have a section devoted to "health and well-being", there is no mention of religion. There should in my view be spirituality and religion, these are most important.

Just as the management of schools will be more effective if left to the schools themselves, and if those schools have to respond to a "market" so, too, should the curriculum. Parents, employers, society as a whole, do know what they want the schools to teach, what they want their children to learn. Teachers are professionals to meet those needs, we do not need politicians and administrators telling us their version of what the curriculum should be. Let them decide such if they wish for their own children, but let us decide for ours.

ZONING

One last item from the Education Act, and the related documents, zoning.

Section 12 of the Education Act 1989 specifies that a "maximum roll" should be set for each school and it may not be exceeded, except of course by that maximum number being altered by permission of the Minister. That section goes on:-

"A school's enrolment scheme shall ---

- a. define a home zone (which may be two or more distinct areas) for the school; and
- b. specify a maximum number of out-of-zone enrolments for the school; and

c. make rules for pre-enrolment procedures (including the procedures by which lots are to be cast for the purposes of this section).

Notice that last bit, "lots are to be cast".

It goes on:-

"While an enrolment scheme for a school is in place, the following provisions shall apply:

- a. pre-enrolment and enrolment procedures at the school shall comply with the rules in the scheme:
- b. every person living permanently in the home zone defined in the school is entitled to enrol at the school:
- c. a person who has been accepted for any year at a hostel that the Secretary has approved for a school for the purposes of this paragraph is entitled to enrol at the school in that year:
- d. every person whose brother or sister is or has ever been lawfully enrolled at the school is entitled to enrol at the school:
- e. except as provided in subsection (9)(14) of this section, no other person is entitled to enrol at the school".

What this means is that the old system of in-zones and out-of-zones is continued under the Act. That if you live close enough to the school, or in a hostel attached to the school, or have a sibling who once attended the school, you have a right to be enrolled at that school.

Having got all those enrolments under the school's belt, we may then look at "out-of-zone" applications. ~~There is to be a maximum number of out-of-zone enrolments specified in the school's published enrolment scheme, and each year the trustees have to set that year's maximum number (bearing in mind the already in-zone enrolments) provided such does not exceed the published maximum number. In other words if the school is under-subscribed with in-zone applicants, it may not top up with a greater number of out-of-zone children in order to fulfil its overall number.~~

If, as of course will happen for a popular school, the number of applicants is large, then all the in-zone applicants have to be met first. Then, where the number of out-of-zone applicants exceeds the number of out-of-zone places permitted, they will "cast lots" as to who is to have a place, they will ballot for them.

This is an unfair system not based on what would be best for the children.

Of course, there has to be a maximum number to a school based upon its present realistic capacity. If the total number of applicants for those available places does not exceed that maximum figure then clearly all those applicants can be accepted.

Where, however, the total number of applicants exceeds the total number of places, some will be accepted and some will have to be rejected. There has to be some kind of selection based upon some criteria or other.

Criteria adopted in New Zealand is selection by where you happen to live.

In practice we know that this can mean selection by money, money to be able to buy a property within the in-zone of a "good" school.

In practice it has also meant selection by interview, primary school records, family support, and other covert measures of a child's ability and aptitude.

There can be no educational logic in one child going to a school in preference to another just because his front gate is nearer to the school. There is educational logic in assessing whether a particular child has the ability and the motivation to pursue the demanding work at that school.

In my view, therefore, there should be no geographical zoning of any school, and the Education Act should have taken the opportunity to scrap all such zones. Of course there will be zones in the sense

that distances, access, and the availability of public transport will govern, to some extent, a parent's choice of school, but these will be through parent's choice and geographical circumstances, not set by the administrators.

Given that some kind of selection is inevitable once a school is oversubscribed, upon what criteria should such selection be based? Certainly not by where you happen to live.

Once there are too many applicants for the number of places available, the school (the principal and the board of trustees) should be free to select from those applicants according to their own set of pre-published criteria. For a secondary school in particular, this could be a preference for youngsters with aptitude in music or sport or some such activity to which the school itself is strong and can therefore particularly cater for such abilities.

Such could also be an assessment of the child's ability and motivation to pursue the highly intellectual, or highly technological, or highly scientific curriculum offered at that school.

Such would not only be overt, instead of the present covert academic selection in some schools, but it would make educational sense, allowing schools to tailor-make their teaching to the abilities and aptitudes of the children in their care rather than attempting, and failing, to cater for diversity of schools, especially in the urban areas, each of which would be more suited to the particular children attending that school. All children, not just the most able, would benefit from such a system, because the content of the teaching would be closely geared to their needs and their abilities.

PART IV

A SCHOOL SYSTEM FOR THE 1990s

Introduction

It is all very well analyzing and criticising, and pointing out how the promise of reform in Picot has foundered on "enlightened self-interest masquerading as moral principles", but where do we go from here? Criticism is all very well, but constructive criticism is better.

Supposing we were starting again, how would we organise education? That's not very helpful either. We have to start from the education reforms as we now have them.

While it seems to me that many committees, agencies, bodies and working parties need to be lain to rest, it is a question of seeing through the early promise of reform, of decentralizing completely, of being prepared to trust the people themselves, the principals, the teachers, the trustees, the parents, and the children.

In drawing together the previous analysis of this report, therefore, I believe the most effective way is to set down a constructive proposal for New Zealand schools for the 1990s. Such starts from where we are now, assumes that government and Parliament will have the courage to get on with it now, in 1990, admitting that the first attempt was calculated to create only the minimum of further upheaval for the education service; it is necessary to get it right this time.

As with the rest of this report, I concentrate upon the schools, but my proposals have analogous application to the other parts of the education service.

I shall not repeat all the arguments here as to the necessity for my proposals, having covered them fully in the previous chapter of this report.

Boards of Trustees

- Individual school boards of trustees, and, for some schools, joint boards, are already in place and should remain so.
- Before their present terms of office expire I suggest they should review their constitution and amend the number of trustees and their representation.
- I suggest that the number of trustees of a school board should be tailored to the needs of the school. A small primary school might choose to have a board of only 5 or 6 persons. A large secondary school board might find 12 or 18 more effective.
- The representative nature of the board should be reduced, and the co-opted number increased, on the grounds that the board has to be an effective non-executive board of management, needing the services of effective individuals for the quality that those individuals bring.
- I would recommend that no voting members of the board should be employees of the school (observers perhaps) and I suggest that even the principal is more effective as the chief executive, present at board meetings, but not being a member of the board.
- I would also exclude any students from being members of the board.
- It would be open to a particular school board to include special representation reflecting local tradition or history. For example, it might be desirable to invite the nearby university or polytechnic to have a nomination to the school board. Clearly, Church integrated schools will wish to have several nominations from the Church.

- It is desirable for individual trustee's terms of office to be staggered so that when one or two retire, or come up for re-appointment, the remaining trustees can co-opt the newcomers (apart from the now fewer representative trustees).

Approval for Changed Composition of the Boards

Proposed changes to the composition of a board of trustees should be approved by the independent body referred to below under "charter" and "property" whose presumption should be to approve, unless manoeuvring were apparent.

School Property

Unlike the present reforms, I strongly recommend that the school property should be vested in the board of trustees, but that board of trustees should be constituted, legally, both as a registered charity and as a non-profit making company limited by guarantee. This would then come under the present independent body which approves and monitors all such registered charities, as well as under companies registry.

Once the property of the school was agreed to and vested with the board, it would then be totally responsible for its care and maintenance, disposal of assets, reinvesting those assets and expansion.

School Charter

Retaining the present term, "Charter", the charter, which amounts to a legal articles of incorporation of the new registered charity and registered company, should not be the present, lengthy political document imposed by government. It should, in fact, be a simple legal document, possibly only two or three pages, setting out the terms and criteria under which the school is to operate, and reaffirming the legal obligations of the school's trustees, such as their obligations to employees under the existing employment legislation.

The charter, too, should be part of the registration as a charity and as a company and approved by the same body.

School Budget

The block grant from central government should be a single (not two part as now) block grant for the year, intended to cover all the expenditure needs of the school and, with complete freedom within that block grant, to the board of trustees to budget as they wish. They will then be free to spend more or less on different expenditures. They will also be free to carry over from one year to the next, to borrow (but obviously also to service such borrowing), and to plan their budgets over more than one year.

Such budget includes all maintenance expenditure, both major and minor, and also any capital works.

Block Grant

The formula for the block grant needs to be clear, open, publicly understood, and simple. It also needs to be most carefully formulated (see earlier).

It should be based largely upon a per student sum, which per student sum of X dollars could have three, but I suggest not more than three, variations according to the age of the child. Thus the grant might be calculated for so many primary children at X dollars per child; so many intermediate aged children at 1.2X, and so many secondary children at 1.4X.

My figures are only intended to be indicative of the system, and need to be carefully arrived at, based upon reasonable per student costs for each age group.

Students with special needs (see earlier) should attract an extra premium.

Students, especially primary school students, where English is not the child's home language, could also attract a premium in recognition of the extra cost of teaching such children. There would not, however, be supplements on racial grounds.

All maintenance costs are included in this per pupil grant. Initially it would be right to make a supplementary grant, spread over the first three years of operation of this block grant, for those schools with a current excessive maintenance bill. Such would not be an on-going extra grant however. Once the trustees have had the money to bring the school up to an acceptable standard, they are on their own, with their budget, to continue to maintain the property.

Capital Grant

I would not have a separate capital grant system. It may be that in order to bring a school up to standard at the commencement of these reforms, extra funding to the block grant will be required, as described above. Such would cover both repair and new building to bring the school up to scratch. After that, the school's board of trustees will plan their capital expenditure out of budget and, where necessary, out of borrowing, in exactly the same way as private schools do now.

Voluntary Income

There will be no charging of fees at the state schools, not for any intrinsically good reason but simply because New Zealand has become accustomed to so-called "free" education.

It remains open to parents, other individuals, companies and societies, to contribute voluntarily to the school fund if they so wish. It remains open to the school to arrange such fund raising events as it may choose.

The board of trustees will be entirely free to spend such money in whatever way it considers best. There will be no block on where voluntary contributions may be spent. Thus such could be used to supplement salaries or to contribute to desirable extensions or whatever the pressing need may be.

Bursar

The calculation of the block grant is intended to cover all expenditure at the school, which of course includes the administration at the school. The board of trustees will thus need to employ the administrative services (and have the money to do so) either by directly employing administrative staff, or, if they prefer, employing one of the many companies offering such services. Most schools would be wise to employ a financial secretary or bursar. It is not assumed that the principal should be engaged in detailed financial and property control.

Board as Employers

As under the present Education Act, the board of trustees are the employers of all staff at the school, and are free to appoint, suspend and dismiss within the limits of existing New Zealand employment legislation. They should be free to seek such staff as they need by whatever means are appropriate.

Teachers' Salaries

The board of trustees should be free to negotiate separately and individually with each teacher they employ, both on initial pay and terms, and on any subsequent pay rises. Each teacher would be on an individual contract to the board of trustees.

In calculating its annual per student grant to the schools, the government will need to put into those calculations an assumed cost per teacher and they would be required to declare publicly the average, or range, of teacher salaries for that year upon which such calculations had been based.

There would, therefore, inevitably be a norm or standard salary in existence for that year as a guide both to employers and to teachers, and such would inevitably become the starting point for the setting of an individual teacher's pay.

Pupil - Teacher Ratio

Similarly, the boards of trustees would be free to employ as many teachers as they deem necessary. They will not be governed by an imposed pupil-teacher ratio but again, similarly, the government would have to have made some public assumption as to the desirable pupil-teacher ratio in arriving at their per student grant.

Principals

~~As with all other staff, the board of trustees will employ the principal and will negotiate with that principal the terms of employment. I would only add that the appointment of the principal is perhaps the most important single task of any board.~~

Annual Meetings

The boards are currently required to hold an annual meeting and to make an annual report. Since that practice has already been adopted, I see no reason to cancel it. It should be an effective measure of accountability.

Procedures of the Board

It will be up to the board how frequently it meets, the subcommittees it appoints, and so on, but all such terms should be declared in its charter.

Services to the School

The principal and board of trustees will purchase, out of budget, all the services (and materials) they need, including services which are now provided in kind, such as in-service training and advisory services. The present providers of those services such as the teacher colleges, can continue to do so, paid for on an individual basis by the schools, and in competition with all other providers of the service. Such will, in fact, attract professionals to offer those services for a fee directly to the school. A simple example would be computer companies giving hardware and software advice and servicing.

This also includes the payroll service. The board of trustees will pay the salaries, just as the board of a private school does. They may choose to do so through their own administrative staff, or they may find it more economic to employ a pay-roll service agency.

School Transport

As described earlier in this report such school transport, as is necessary, should also be the responsibility of the board of trustees and the block grant will include an element to cover this.

Special Needs

Children with special needs will attract an extra per capital grant. For some children with exceptional handicaps or exceptional learning difficulty, such a premium might well be substantial.

It will be up to the parents, no doubt in consultation with the professionals in this field, to place the child in whatever school seems most appropriate, and the school is thus funded through the per capita grant which that child carries with it.

Such could therefore be at an "ordinary" school capable of catering for that child's special needs, or at a special school. The special schools will thus be managed and funded as with all other schools, except of course that their per capita grant will be that much the more. There would be no need for the Special Education Service Board.

Admissions to Schools

~~There should be no legally enforceable zones of enrolment.~~

Parents should be free to apply to any school they wish to.

Schools should be required to publish their admissions criteria, and such would be declared in the school's charter. This means that in the event of a school being oversubscribed, the board of trustees would apply those published criteria in choosing which of the many applicants can be offered a place.

It would be open to a board of trustees to continue with their present arrangements for accepting pupils, namely on proximity to school. In other words the school could declare that it wishes to continue with the present zoning arrangements.

It would be open to the board to declare other admissions criteria, including assessment of ability and aptitude, if they considered such to be appropriate.

School Prospectus

Each school should be required to publish a prospectus which should be readily available (at a charge if need be) to prospective parents.

Such should give at least the minimum information about the school, but in the competitive climate to be created by these reforms, boards of trustees will no doubt wish to present the full benefits of their school in the prospectus.

Self-Managing Schools

The above reforms amount to fully, self-managing schools.

Through the method of funding they would have both the means and the incentive to respond to parental demand for their services.

They will be free to expand (out of their budget) to meet the increased demand and remedy deficiencies in the event of reduced demand. They risk closure, or, before closure, replacement by another board of trustees, if the school were to continue to decline.

Such schools will correspond, over a relatively short period of operation of these reforms, to the quality and quantity of school places which the public demands.

They have the incentive to use their resources as effectively and as efficiently to best meet that demand.

Parental Choice

Parents will be free to exercise their preference for school, both primary and secondary. Clearly in exercising that preference, parents will need to take into account all the circumstances, including the geographical location of the available schools. If by choice, or by necessity, the family live in a sparsely populated area, there will clearly be few schools, perhaps only one, from which to choose.

In urban areas, there will be more schools within reasonable distance of home.

Even where there is only one practicable school to choose, the school will still need to maintain its quality, for it will be open to the parents to threaten to withdraw their children, and to apply for either the replacement of an unsatisfactory board of trustees, or for funding to establish an alternative school.

Far more than having parent trustees, or being members of a committee, or a representative on an advocacy council, the real power of the parents should be that of consumer power. They are the customers, on behalf of their children, of the school. It is ultimately the collective choice of those parents which will determine the quality, quantity and types of school and, under self-management, those schools will have the means and incentive to respond to such choice.

It is this consumer-led service which has been missing from the current reforms. Education has been, and continues to be in many countries, a producer-led service. It should not be.

Distinctive Schools

By a combination of parental choice and admissions criteria, schools will diversify to suit parental demand. As already indicated some may become more academic, more technical, or with an emphasis on sport, arts or music. Also we already have schools with a particular spiritual or religious ethos, notably the Roman Catholic and Anglican schools.

In the same way, it would be open to the local Maori to organise and to attend schools with a particular Maori approach to education, culture and language. Such would be what we now call "integrated" schools, funded and managed in the same way as all other state schools.

Ministry of Education

It would be obvious that if the decentralization of the education service is completed as described above, there will be very little for a Ministry of Education to do, and practically nothing for the other centralised services which continued, or were set up under the Education Act 1989.

The principal function left to the government will be to fund the schools. It remains a political decision how much tax payers' money should be spent on the schools (and the other education institutions) in any one year. However that decision may be arrived at with the help of Treasury. There will then be a clear, publically declared formula upon which that money is divided up into block grants to the schools, based almost entirely upon a per capita formula.

It remains a political decision whether the arrival at that overall sum, the calculations made to arrive at it, and the preparation of the block grants, should be done by a very small department called the Ministry of Education, with a separate Minister, or by, as it could be, a branch of the Treasury.

I see very little else for a Minister and Ministry of Education to do.

Inspectorate

Under a system of fully devolved management of schools, responsive to parental wishes and children's needs, there is still a need for a national inspectorate, a kind of consumer protection body. Such a New Zealand Inspectorate of Schools is one of the few central education bodies that I would retain.

Retain is the wrong word, for we do not really have such an inspectorate at present. The Education Review Office go out of their way to emphasise that they are "reviewers" and not "inspectors" (see earlier).

I recommend that there should be a small corps of inspectors, probably no more than 50, who would inspect all schools, both state and private. They would inspect all aspects of a school, but most especially the curriculum, teaching and achievements of pupils. They would not be advisers or reviewers. The Board of Trustees of the schools are free to employ the services of such advisers.

The inspectors would not be charged with inspecting at regular intervals - they would be free to inspect a random. Some inspections would be short and simple. Even one inspector for one day can get an adequate "feel" for the quality of a school. Others would be full inspections taking several weeks.

In addition to such random inspection at irregular intervals, the Minister of Education, or some such authority, could request the Inspectorate of Schools to inspect a particular school, especially a particular school for which there have been substantial and substantive complaints.

All inspections would result in a published report.

Under this proposal, the Education Review Office as we now know it would be closed.

National Curriculum

It is reasonable for there to be a statement of overall expectation for the content of education in New Zealand schools and this would probably emphasise the need for literacy and numeracy to a high standard.

There would be no compulsion upon all schools to teach Maori language and culture. Many may choose to do so, and specifically Maori schools would almost certainly do so.

There is no need for any statutory body or government department for the National Curriculum, no need to specify the curriculum in greater detail. Such detail will vary according to the school and to the demand, and certainly no need to impose, statutorily, a curriculum or parts of the curriculum.

Public Examinations

There is a need for the School Certificate or an equivalent examination at the end of Form 5, and for University Bursary/Entrance Scholarship examination, at the end of Form 7.

These need to be written examinations, externally set and marked, with clear grades or percentage marks awarded.

There is no reason why there should be only one Examining Board. There could be two, totally independent of government, and financed by the fee paid per subject per candidate. This fee could be paid by the government/school for the candidate, by the parents or by both.

My preference is that such examining board or boards should be associated with, or attached to, one or more of the universities.

In order to provide a further alternative public examination, schools and employers might well look at comparable examinations from abroad, not necessarily from Britain, but the London University Examination Board's examinations are a good example.

For entrance to university, a further alternative public examination worthy of consideration is the International Baccalaureate.

Assessments

The Sixth Form Certificate as we now have it is not an examination, but is largely an in-school assessment. Similarly the Higher School Certificate is, in effect, an in-school assessment of the work done in Forms 6 and 7.

These may have merit, but are no alternative to external, public examinations.

I would strongly recommend that the government leaves to the schools themselves such other assessments as teachers may apply during the course of a child's school career. All good teachers are constantly assessing their pupils, monitoring their progress, adjusting the teaching accordingly. Universities and colleges of education may well wish to offer recommended systems or schemes of assessment, but none of this should be done by government or government agency, and none of it should be compulsory.

I hope that the look at assessment which some people from New Zealand are currently taking, as now being explored in Great Britain, will convince them that it is best left well alone.

School Leaving Certificate

If a proper, objective record of achievement of a pupil can be compiled to some kind of nationally agreed model, then this could be of value both to the school leaver and the potential employer. However, I am doubtful if such a national school leaving certificate of equal, objective worth can be achieved. I think their worth, or otherwise, will be highly related to the employer's, or other user's, perception of the quality of the school issuing the report.

Whether or not there is such a School Leaving Certificate, or record of achievement, such is no substitute for a School Certificate examination or equivalent.

Teacher Training and Qualification

I refer to my comments earlier.

While the training of teachers would continue at the teacher colleges, and may continue to be the major source of trained teachers, alternative routes should be developed based upon learning how to teach on the job, within the school, under expert supervision.

"Qualification" should be available to all teachers whether trained by the college route, or alternatively, and instead of the Teacher Registration Board, such should be in the hands of a proper, independent, professional body of teachers.

National Bodies and Agencies

Under these recommendations:-

there would be,

- a New Zealand Inspectorate of Schools
- a Ministry of Education or some such government department for funding the schools

there would not be the present,

- Parent Advisory Council
- Teacher Registration Board
- National Examination and Qualification Authority
- Education Review Office
- Special Education Services Board
- Early Childhood Development Unit Board

there could be, but if so only on a competitive, non monopoly basis,

- advisory services based upon the teacher colleges
- school publications and audio unit
- school library services

there would continue to be,

-
- Correspondence School
 - National Library

PART V

A FURTHER OPTION

The reforms which I summarise in the previous chapter, if implemented now, would result in two to three years time with a schools system which would look like this:-

1. All schools would be self-managing.
2. There would be real parental choice between those schools.
3. There would be greater competition between schools, and greater incentive for those schools to achieve the standards of the best, even in rural areas where of necessity there is less direct competition.
4. Funding of the schools would be established by then on a clear, well understood per pupil basis.
5. The schools would, in a few years' time, have become accustomed to managing their own affairs; appointing staff and determining pay and conditions; assessing standards and taking policies and decisions accordingly; responding to parental demand; managing the property; managing the budget.
6. ~~All this would be achieved without the "support" or interference from the present multitude of national agencies.~~
7. Conversely, the parents and their children will have become accustomed to be treated as the consumers, the clients of the system.

I could amplify further on these seven points, but such is sufficient to indicate the kind of effective and efficient schools system which would result, responsive to society's demands for higher standards of achievement by the pupils.

Some might say that is enough reform for one decade, and would be a sufficient and satisfactory outcome of our present efforts.

There is, however, a further step which could be taken and which would improve still further the market response of the system, and this the higher standards to be achieved.

Under the system described above, and in the previous chapter, the school is funded by an annual block grant which is calculated largely on a per pupil funding formula; so many children of particular age multiplied by the per pupil funding; a further number of children of a different age group multiplied by a slightly greater per pupil grant; plus enhanced per pupil payments to cover, for example, children with special education needs, or children for whom English is not their first language.

The next step in the reforms would be to pay that per pupil figure directly to the parent in a form which is only spendable upon schooling, for that parent then to pay that sum over to the school of his or her choice. In other words all state schools would charge a "fee", but the parents would have the means to pay that fee through a voucher, or education cheque, or tax credit provided (as now of course) out of taxation. The school would then depend upon such income, upon attracting in such income, just as any private school does today.

The school, for the same number of children over the same age spread, would be receiving the same total sum of public money from such a voucher system as they do now from the present block grant system. In stead of the figure being calculated back at the Ministry of Education and sent as a block grant, it would arise from having attracted in the same amount of money from individual parents "sending" their taxpayer funded voucher or cheque with that particular school.

More so than before, more directly and obviously than before, the school would have to sell itself, its funding would depend upon being able to attract and retain children. Similarly it would be much more obvious to the parent that in choosing a school place for the child, that parent is actually spending money, even if still taxpayers' money, stimulating the concept of value for money, stimulating almost the same concern that the money should be well spent as if the money were directly (instead of out of taxation) out of that parent's pocket.

The psychological advantage of having such a voucher or education cheque, both to the schools and the parents, should not be underestimated. It would even more stimulate the health market approach. Such would not be sufficient justification, however, for introducing the voucher if it were only spendable at state schools.

The education cheque or voucher should be spendable at any state school – subject of course to the admissions criteria set by that school as to the age of children, single sex or not, academic qualification, and so on. It should equally be spendable at any private school. The private schools would not be obliged by law to accept the NZ Government education cheque, but in practice the market situation would mean that they would want to.

The school would be able to charge a fee above the value of the education cheque, or equivalent to it. If above, the parent would find the difference between that fee and the value of the education cheque out of his own pocket.

There would thus be no difference from the parents' point of view between the present state schools and the present private schools, both would be self-managing institutions charging fees, except that at the "state" school it would still be "free", in the sense that the education cheque would cover the full cost of the fee, whereas at the "private" school there may or may not be a supplement to find over and above the value of the education cheque.

In such a system the number of private schools would increase. There are, today, parents able and willing to pay something towards their child's education (to top up) but not able and willing to pay the full cost of a private school education. If the amount of taxpayers' money now being spent on their child's education at a state school were to be available to them and usable at any school, by means of the voucher, then many more parents would choose a private school. Such would increase the competition between all types of schools; such would increase the choice of school for the parents. Such would also increase the total amount of money being spent on the education system in New Zealand without increasing taxation; it would draw into education some of the parents' present spending power. A political decision to be taken at the time would be whether the present state schools would be permitted to charge a fee above the value of the voucher. If they were, the parent would find the difference, as with the private schools, and the state schools would have a greater income to provide what the parents want. Indeed such state schools would then be no different, from the parents' point of view, to the private schools. If, however, in making that decision the politicians thought that there still ought to be "free" schooling available to all, then it would mean that at least enough state schools throughout the country would have to offer education to the value of the education cheque and no more.

The actual mechanism for distributing the annual per pupil schools expenditure, through the parent to the school, is open to discussion, and is not fundamental to the principle. It could be a piece of paper looking like a bank cheque which would state that it was worth, let us say for the sake of argument \$4,500, payable to Mr and Mrs Smith on behalf of their son John, and only cashable at schools in return for education for John; it would be a non-negotiable, non-transferable bond or cheque or voucher. Its value for a particular child would vary according to the per pupil funding formula adopted, with extra payments according to special needs and their factors.

Clearly such would have to be backed by an effective computer based system to distribute and monitor the use of the voucher or the cheque, but these days that is comparatively simple to do. It could, of course, all be done by computer. There is merit, however, in expressing this education spending power through a tangible piece of paper, readily seen and understood.

The system could of course, be integrated into the country's tax-benefit system, such that income tax, social security benefit, other benefits and grants, were all paid through the same form-filling computer system, and one of the benefits or grants in such a system would be the education credit payable upon declaration of the number of children of school age and so on. Such assumes an integrated tax-benefit system which has not yet been introduced, part of which of course would have to be so-called "negative" income tax.

The system by which the education cheque or voucher is made to the parent is important, and has implications for the rest of the tax-benefit system, but the system chosen is not fundamental to the principle of paying schools for their services on a per pupil basis, paid through the parent.

A further political decision which would have to be made is whether such a voucher should be taxable; there are arguments both ways. A taxable voucher would mean that it would be distributed free to all parents for each child's education; then if the family income were below some agreed figure, that voucher would not be taxable; but if the family income were above some agreed threshold, it would be taxed at the standard rate of tax, or at some other rate. In other words some of its value would be clawed back from the wealthier parents.

At present all parents, including the wealthiest parents, receive "free" (that is taxpayer paid) education for their children provided that they choose a state school. If they choose a private school they have to pay twice, once through taxation and once through school fees. Such is not, therefore, completely free choice of school; there is a severe financial penalty for choosing a school not run by the state. If we really meant free choice of school, and if we really meant all schools to be able to respond to such parental choice, the voucher would be distributed to all parents, and not be taxed back. The parent choosing the more expensive school would still have to pay, but only the difference between the "standard" nation-wide value of the voucher, and the more expensive fee from the school; that would be fair enough, and part of the parent's judgement in choosing that school.

On the other hand, the wealthier parents using the private schools are already paying the full fees, so, the argument runs, why give them a hand-out of taxpayers' money in the shape of a voucher, even if such would be fair, because they do not need it, they can already afford the fees. If that argument persuades, then one would tax the voucher, but remember that if you did do that, you have departed from another principle, namely that of "free" education to be available to all. But then indeed that principle has already been broken in that "free" education is not available to those who do not wish to use the state schools.

Such, and similar considerations are clearly important political decisions which have to be taken at the time. I merely show that there is not one "voucher scheme" but several variations upon a theme.

That principal theme, however, is that parents should be given the taxpayer paid education for their children in the form of cash, or equivalent cash, a voucher, instead of as now, in kind, namely a "free" school place. They would then be free to choose the school of their choice rather than, as now, be limited to the kind of school which the government chooses to provide.

Such a system is, it seems to me, the eventual system to aim for, creating as near as possible a true market, given that the bulk of education expenditure will still be paid out of taxation.

As I said earlier, the reforms described in Part IV should be pursued anyway, and would bring great improvements to education in New Zealand, and they could be considered to be sufficient. The icing on the cake would be to take it to its logical conclusion, and introduce the voucher as described here.

APPENDIX I
 Commentary Upon
Tomorrow's Standards
The Report of the Ministerial Working Party on Assessment for Better Learning

A Working Party under the chairmanship of Prof Sir James Stewart was established by the Minister to consider "assessment" and to make recommendation.

This report, entitled *Tomorrow's Standards* was published in 1990, after the draft of the present report was submitted to the NZBR, but before final publication, hence this Appendix.

The terms of reference of the working party were:-

The Working Party shall;

- (a) recommend to the Government procedures for assessment which:
 - (i) can monitor the effectiveness of the New Zealand school system on student learning;
 - (i) assess the effect of individual schools on students' learning achievements;
- (b) recommend ways of reporting on the above, taking into account different audience needs;
- (c) within the context of New Zealand's dual cultural heritage, advise the Government on the possible effects of such assessment and reporting procedures for students, teachers, the curriculum, schools, employers, and the wider community;
- (d) as a preliminary step to making the final recommendations, prepare a public discussion document:
 - (i) outlining the main issues of assessment for better learning;
 - (ii) describing a range of models and procedures for assessment.

In fulfilment of section (d) above, the working party issued a discussion document on 22 September 1989, and requested responses from the public to be made by 1 December, later revised to 22 December 1989.

That consultation document, entitled "Assessment for Better Learning" already gave a fair insight into the opinions an approach of the working party. It also gave a very strong steer as to the response the working party was looking for. Indeed the content of the final report could fairly be forecast from the tone and content of that consultation document.

I have already examined that consultation document in Part III of this report, pages 39-44, and I express there my concern that the working party would be greatly influenced by concepts of "fairness", "equity", "lack of failure", and the like, and not enough by assessing the actual standards achieved.

The reader might care to compare my analysis of the working party's approach, based upon their consultation document, as given above, with the final report of the working party, *Tomorrow's Standards* published by the Ministry of Education.

It is interesting to see the responses which the working party received to that consultation document. To quote from *Tomorrow's Standards*,

"There was a wide divergence of views on fundamental issues. This divergence was as marked among experienced educationalists as it was with the general public. For example, some argued that competition is a part of life and that failure is a necessary corollary of success. Others argued that competition and failure cause many children to give up before achieving their potential."

"There were strong differences of opinion over whether schools should be compared publicly on the basis of an academic performance in national examinations. Responses from schools with students from economically advantaged homes, which are likely to do well on such as comparison, were generally in favour. Conversely schools with high proportion of disadvantaged students saw such comparisons as grossly unfair and demoralising."

Overall, I found this final report disappointing, a pretty thick document which, when you come to analyse it, takes you little farther forward. There is too much woolly civil service jargon, tedious to read. Just one example; civil servants and politicians love the word "appropriate". It begs the question "appropriate for what". It begs the question "who is deciding it is appropriate anyway". I quote from page 25 of *Tomorrow's Standards*,

"If the wrong signals are sent, participants in the education system may redirect their efforts inappropriately. Also, information gathered appropriately for one purpose may cause more harm than good if reported or used inappropriately."

The working party emphasises, both in the text and in the title to the report, that this is not to be assessment to no purpose, or for the sake of it, but assessment "for better learning". The ultimate object of the exercise is to be better learning by the students in the schools. That much I imagine we all agree to.

This "assessment" and procedures for it, covers, the working party asserts, four main areas, namely,

- the education system as a whole
- schools
- teachers
- students

In the introduction to *Tomorrow's Standards* the working party asserts_

"We have paid considerable attention to the first three of these, keeping in mind the new lines of accountability envisaged in the reformed structure of education."

Of the fourth, the students themselves, the report says

"We have also focused on the assessment of students at both primary and secondary levels, conscious that "better learning" was the major criterion in our terms of reference."

Monitoring National Performance

The Education System as a Whole

It seems to me that the only worthwhile national monitoring to be done is in the context of the performance of other countries, and this participation in the IEA (International Association for the Evaluation of Educational Achievement) programmes of comparative assessment are very valuable. Even so there is scope for more detailed assessment comparing the performance, the achievement of students, in mathematics, literacy, science and so on with those of other countries, especially the other OECD countries.

Such is a complex and costly process, and to be fair to those trying to do it the full information is just not available, not only in NZ, but in those other countries.

That said, what is going to be done with the information if and when we get it? The answer is not at all clear, but I fear the answer is "not a lot". *Tomorrow's Standards* reports, page 20,

"Careful national monitoring of educational outcomes in Scotland did not appear to be used to any significant degree by policy makers."

Furthermore, in several places in the report, the working party has asserted that NZ is unique in many respects with its own problems and its own peculiarities. I do not actually believe that it is as unique as all that, but is rather in the mainstream of education and culture of the advanced countries of the world, with an obvious affinity and similarity to other English speaking countries. Nevertheless, if the policy makers believe that NZ is a "special case", they are even less likely to take into account the results of any such international comparison. What happens abroad and the results achieved abroad are not relevant here! In which case there is not much point in doing the comparisons!

Certainly national monitoring in an international context is difficult, costly and long-term, and unless we are prepared to take lessons from the results, there is not much point in doing it.

Assessing the Effectiveness of Schools

The next area of "assessment" which the working party addressed was the schools themselves. Here there is much more immediate point in trying to do this.

Provided we are assessing output in terms of the achievement of the students, and provided we are allowed to compare that output with those from other schools, we can begin to learn lessons as to why one school is "better" than another, and start to take remedial action where needed to raise the standards of the low achieving schools.

The working party report states, page 26, that.

"The previous structure (previous to the recent reforms) used a complex system of regulations to control schools – controls designed to ensure that those involved with schooling complied with standards perceived to be necessary for an effective education system."

"The new structure already provides for centrally-controlled accountability and performance development assessment of schools."

One is entitled to ask, standards perceived by whom to be necessary for an effective education system. The new structure with its "centrally-controlled accountability" still assumes that some group of "experts" sets the norm, decides for us what is good and what is not, decides for us what standards children should or should not reach.

Asserting that in some way the experts have to set the rules for us, mere parents, to make judgement on the schools and their ability to teach our children effectively, the report says,

"There is a temptation to make judgements about schools in the way many people make judgements about art – "I don't know much about it, but I know what I like."

I am not sure why the experts think that such is an unacceptable basis for the appreciation of art. Translated into the school context, a parent might say "I don't understand all this education jargon, but I know when I see a good school." If pressed, the parent would probably say, "and a good school is one where the students achieve high standards, high academic standards, standards of self discipline, of moral behaviour, and so on."

The British Department of Education and Science published at the end of 1989 a long list of "performance indicators" which were thought to be "appropriate" for use as a "management tool" for the schools. The working party recommends that many of these performance indicators be adopted in New Zealand, probably supplemented with others devised specifically for New Zealand.

There is indeed a whole new industry growing up on assessment of schools, performance indicators, and the rest, all with copious pages of reports, all with its inevitable jargon.

The consumer, the customer, the client of the schools, namely the parents and their children, are entitled to cry "I don't know much about it, but I know what I like", and to cut through all the red tape, and to assess the schools in the most effective way that there is, by choosing the schools that they prefer, and rejecting the ones that they don't.

The ultimate assessment must be that of the customers of the system. The most effective monitoring is that of the market. Let the collective choices and the collective wisdom of the parents prevail; let the parents have genuine free choice of school, and the schools the means and the incentive to respond to that choice; do that and you have the most effective assessment procedure of all – the market.

Assessment of Teachers

The working party report, page 59, states,

"In practice, the actual assessment of teachers is intended to be delegated to the school principal; but the extent of the principal's autonomy in carrying out this task is presently unclear."

Under self-management of schools, if pursued as recommended earlier in this report, it is the board of trustees, the managers of the school, in conjunction with the principal of that school who appoint, promote and dismiss teachers. It is they, therefore, that have to "assess" both applicants to new posts in the school, and teachers already in their employ.

Guidance as to how to go about such assessment, the factors to look for, would be useful indeed, and by all means let the Chief Executive of the Ministry of Education recommend and clarify, as the working party suggests, but the ultimate assessment and decision based upon that assessment must rest with the principal and the trustees of a school.

Assessment of Students

Much as the working party, in their own words, "have paid considerable attention" to the first three areas of assessment, the system, the schools, and the teachers, I suspect that it is the assessment of the students which interests most the public as a whole, and the parents in particular.

Furthermore, such assessment is very much an "assessment for better learning". The assessment is a target for the student to aim at, something which the working party plays down. We all need hurdles to meet and overcome, we all need heights to scale, targets to achieve, in order to give of our best. That side of assessment is much played down in the report.

Assessment is also for remedial action, to find out where the student's weaknesses lie, and to take remedial action accordingly. Such is an on-going process which every good teacher considers to be part of teaching, constantly assessing how the child is learning, where the child is having difficulty, what different approach might be needed to get the point across.

Assessment is, of course, also of strengths, and having identified those strengths, to give the student the opportunity to exploit them. This does not seem to be too popular with the working party either. The student who is assessed as excelling in sport might well be encouraged, but the same attention and extra help does not seem to be forthcoming if the strength is an academic one. Perhaps it is the old tall-poppy syndrome.

Understandably the report subdivides assessment of students as between primary and secondary schools.

Assessment of Children in Primary Schools

The working party has examined the assessment and the procedure being promoted at the present time in the UK, and rightly rejects them as much too prescriptive, detailed and complex. I breathed a sigh of relief when the report said, even if terribly politely, that at least in this respect, the British had got it wrong.

Even so, the working party still risks being too prescriptive upon NZ schools and NZ teachers. I do think that continuous assessment of the child by the teacher, as part of the teaching process, is a part of the professionalism of teachers, and suffers if outsiders attempt to prescribe for those teachers. That said, by all means devise tests and methods of assessment which the teachers might find helpful, but do leave the ultimate judgement to the professionalism of the teacher.

The report rejects external assessment of primary school children. Here I disagree. Giving the teacher the freedom to teach, including to assess, as part of the professionalism required of every teacher, I do think the public as a whole and the parents in particular have the right to expect some kind of external assessment of progress. I would limit this to literacy and numeracy, and I would apply external tests. These days such can be done effectively and economically through computer based systems. I would invite the Minister to look at these again.

Criterion Referenced – Norm Referenced

In common with recent education reports the world over, much is made of the difference between criterion referencing and norm referencing.

Criterion referencing is reference to some fixed, objective standard; norm referencing is reference to the performance of others. On the face of it, criterion referencing should be preferred. It might be useful to know that little Johnny is placed top of 30 children (norm referencing), but of even greater interest to know what exactly he knows and can do (criterion referencing).

Much is made of this both for assessment at primary level, and for the public examinations at secondary school level.

It is a beguiling argument, but closer examination shows that only in very limited areas are there such objective standards to be pursued anyway. In maths, mathematics and much of the sciences, criterion references should be possible. There is only one answer to a mathematical problem, thus the student either has it right or has it wrong, regardless of what the other students do and how many of them have it right. Even there the examiner quickly moves away from such absolutes; has he got it right, but without understanding why; has he got it wrong by a silly miscalculation but his method of working was correct. We quickly move into subjective assessment even in mathematics, never mind assessing the quality of an essay.

The working party clearly hates the idea of ranking students' abilities with respect to those of other students. The examination system is, they say, merely telling us how well one student is doing relative to that of fellow students.

Let us set national levels of attainment, the argument runs, be it in reading ability, or computer skill, and then, year by year, student by student, assess performance of each relative to that absolute norm, to that fixed criteria. Sounds simple does it not?

The trouble is that the norm is not absolute, but is relative to previous years' and previous students' performance. In setting what would be a reasonable standard for a student to be awarded an A grade, or a B, or whatever, it can only be done, is only being done, by reference to what experience over previous years and previous students suggest is a "norm" for that particular age of child. For example we speak of a reading age of 7, or 8, or 9. That is not an absolute standard. It means a level of reading ability which, from past experience, is average for a 7, 8, or 9 year old.

Thus all that so-called criterion referencing does is to attempt to set a standard based upon the norm of previous years, and then relate current performance to that norm. It assumes that the "experts"

get their assessment of past performance right in order to set the criteria, and it assumes that they are able and willing to continually update that criteria in the light of changed syllabuses and the rest, and to do that objectively.

Norm-referencing, on the other hand, merely ranks a student's performance relative to that of other students in the same year, in the same assessment. It assumes that individual and generationally differences over the years iron themselves out. It accommodates, automatically, differences in the difficulty of questions or the severity of marking, year by year.

Overall it could be that norm-referencing, for all its alleged shortcomings, is the more useful, and in the long run, the more accurate.

Primary Progress Records

When we apply these considerations of criterion and norm referencing at primary level, my point is well made.

Tomorrow's Standards, paragraph 7.1.3 on page 34, refers to the new system introduced of primary records. The report says: –

"The new system emphasises assessment and evaluation based on levels of achievement rather than on comparisons between students. Descriptions of what each student can do forms the *as is* of comment. A child's progress and development is related to sets of learning goals which identify broad levels of achievement, skills, and attitudes.

Sounds good, sounds like criterion referencing.

But then the example given on figure 7.1 on the next page tells us what these fixed, absolute levels of achievement are to be. I quote:–

- understands that people interpret experiences differently;
- listens with courtesy to the opinions of others;
- reads for enjoyment and information, according to own interests, needs, and background;
- finds, selects, organises, and uses information for own purposes;
- shares writing with an audience and responds helpfully to the writing of others;
- (in mathematics) knows and recalls basic facts (which basic facts?);
- recalls and shows understanding of mathematical conventions and processes (which ones?);
- is confident in using mathematics;
- perseveres in seeking solutions to problems.

Isn't that norm referencing dressed up as criterion referencing, and with a heavy dose of "experts" own expectations of what children should do? One of the usual difficulties in such assessments, and British "experts" have recently found the same, is that the so-called levels of attainment which they are set are inevitably low, purposely so in order to accommodate the least achieving children. The result of course is low standards for all.

Assessment in Secondary Schools

IN introducing this area of assessment, the working party's report says.

"There is widespread agreement among secondary school teachers and the community that national consistency of standards is needed for at least some components of the certification of students. This is to ensure that the future of students is not affected by the reputation of the schools they attended..."

I have already cast doubt on this concept of national consistency of standards, and who decides what standards. But why must we "ensure that the future of students is not affected by the reputation of the schools they attended"?

If the "reputation" of schools is based upon past performance, upon the quality of output that the school manages to achieve, which it is, then the future of the students will be affected by the perceived quality of the school, good or bad, especially as perceived by future employers, and that is true whatever the working party or the government may say to the contrary. The solution, of course, is to raise the standards of the poorer schools, so that all the reputations are good. After all, "reputation" is not such a bad measure of quality!

Public Examinations

Here I depart most strongly from the working party. As expected, they want to get away from tough, academic, externally set pass and fail examinations.

As the report itself says, page 44,

"Many adults in New Zealand still think of School Certificate as it was when they were in school, failing to recognise the radical changes that have occurred in the standard and nature of the award since then".

Alas that is true, they still firmly believe that it is a fair measure of achievement.

The report goes on,

"Twenty five years ago School Certificate was still awarded on the basis of the cumulative total in four subjects, and a pass represented a very substantial achievement."

Now the pendulum has really swung the other way.

Years ago only the top ability students achieved top grades in the public examinations at age 15; a pass was a measure of high ability; a failure required more work and a retake, or else pursuit of less academic, though still worthwhile, education and training. The trouble was that there was then no satisfactory assessment examination for the great majority who did not have that top academic ability.

Now, the pendulum has swung the other way; practically all must be allowed to pass, and there is thus no longer any real and taxing assessment for the high fliers. In lowering the standards of the examinations in order to meet the needs of the majority, the needs of the highly academic minority have been ignored.

here the working party make an observation with which I whole heartedly agree. In asserting that students need courses and standards to meet their own needs, and that assessment standards have to be "appropriate to their capabilities", the working party concludes, page 45,

"No national examination taken by an entire age group can create these conditions, or even closely approximate them."

So, one, universal, all embracing examination for all abilities and aptitudes of children does not work. Actually we could have told you so.

One approach to that momentous conclusion would be to say that in that case we had better have two or more examination/assessment systems to meet the different needs of the different students; the other approach is to say if that be the case lets have none of it at all.

In effect, the working party have chosen the latter, let us have no academic examinations worth the name. I think New Zealand will have to return to intellectually rigorous examinations for the more able children, and more vocationally oriented courses and examinations, and awards, for those students whose abilities lie elsewhere.

School Certificate

The School Certificate has changed in recent years from the robust, tough examination which parents still remember.

The report tells us, page 44,

"It is clear that School certificate is rapidly losing its value as an employment qualification."

"School Certificate has largely outlived its usefulness."

"Its days as a meaningful leaving certificate are over."

Is that surprising?

Having concluded that the recent experiment in changing the School Certificate to a comprehensive examination has "failed", the working party recommends "that the School Certificate award be re-assessed in two years time..."

If it has failed, why wait two years, why not get on and remedy the situation now?

The remedy, of course, is either to continue with the present revised form of the School Certificate for all, and to introduce a tougher, more academic examination for some as an option running in parallel, or to revert the School Certificate to its former self, a tougher academic examination, and introduce a new, all purpose assessment at the age of 15 to run in parallel.

Whichever way you do it, you need at least two parallel examinations.

Sixth Form Certificate

This is really a school-based achievement-based assessment. The working party recommends a new form of national moderation for the certificate. I am prepared to accept that the sixth form certificate has some value in the teaching process, but it is not an objective external examination.

University Bursary

As a forerunner to University entry, or other degree level course, a tough, academic examination must be retained. If the Bursary standard is not to be retained, universities will inevitably have to find other means of assessing the ability of a student for entry to a particular degree course. As I have said elsewhere, such might be the International Baccalaureate. Better still, retain the best possible standards for the University Bursary.

Again I have to say that if there is a need for another kind of examination at the age of 16 or 17 for students staying on in school but not likely to go on to university, as I believe there is, indeed a diversity of courses and examinations is needed, let these be developed, but not at the expense of, and not instead of, the more demanding academic examination.

Assessment of Maori Children

A section of the report applies itself to the needs of Maori, and the concern that we all have at the apparent under-achievement of Maori children. My earlier comments in this paper on the concern for Maori also apply here.

It does not make sense to lower standards in any charitable attempt to meet Maori concerns for low attainment. The assessment standards need to be high, for all New Zealanders. It is the education system which needs to address itself as to why certain groups, not only the Maori, are

underachieving, and thereby to raise their performance to that of the rest of the population, and even to exceed it.

I understand and share this concern for the welfare and education of Maori children, but the solution is to raise the performance, no lower the standards.

Conclusion

An opportunity missed.

A list of recommendations which takes us little farther forward.

A rejection of the high academic standards which New Zealand needs.

A re-assessment of "assessment" is now needed.

APPENDIX II
 Commentary Upon
Today's Schools
 A Review of the Education Reform Implementation Process

Another group of people under the chairmanship of Mr Noel Lough, and including Dr O'Rourke the Chief Executive Officer at the Ministry of Education, a representative of the Treasury and one from the States Services Commission, were requested by the Minister of Education to review the implementation of recent education reforms.

Their report entitled *Today's Schools*.

Their terms of reference were :-

"To carry out a wide ranging review of the process and outcomes of the reform of education administration to date and to recommend any necessary improvements in the process or the structures."

They reported in April 1990.

The fact that this Appendix II, my commentary upon *Today's Schools*, is very much shorter than Appendix I above, my commentary upon the report *Tomorrow's Standards*, in no way indicates that I consider *Today's Schools* to be less important. On the contrary, it is a most valuable contribution to the current debate, and my briefness of comment only reflects how closely I agree with it. I can only recommend that all those concerned for and with the current education reforms read that report from the review team most thoroughly, and take on board its recommendations.

Even so, the review team has been very restrained in their criticism of the implementation of the reforms, and very modest in the recommendations they offer. I fear that they do not go far or fast enough.

For the more radical approach, you still need this NZBR report now before you.

I shall take just a few of the recommendations made in *Today's Schools* and comment upon them. I might add that this is a much more readable report than some.

Page 6

In the foreword to the report, the chairman comments:-

"Through consultation it became clear that this has been a tough transitional period; that much is working solely because of the hard work and dedication of those involved; that there is still wide spread support for the concepts outlined in Picot, but that what is emerging in practice is very different.:

"There is a sense of increased central bureaucratic control, increased burdensome administrative tasks, inadequate resourcing and support for the institutions, and inadequate attention to educational outcomes."

Such is a more restrained version of my observations earlier in this report. There was, and we must hope still is, general support for the concepts in the original Picot report, especially the decentralisation to self-managing schools. As I have shown in this report, and as *Today's Schools* confirms, the centre has clawed back much of its responsibilities and power, and much of the money which should have been devolved to the schools themselves.

Page 7

Amongst the detailed recommendations on this page, the report says;

"That there be grater opportunities for boards of trustees and principals to contribute to charters through the Ministry of Education freeing up the charter requirements over time."

I would only comment, why "over time"? It is quite scandalous the way the spirit of Picot was overruled and overridden by the Ministry in effect writing the charter for each school. Even now the schools should be entitled to write the charters as they want them, and approval by the Minister should be automatic.

On the same page, the report says,

{That a system for assessing educational outputs be further developed, which is based on national standards; and that these assessment and evaluation systems be designed to allow comparisons over time between students, schools and, if possible, countries."}

Whilst accepting such a recommendation, I cast doubt, in Appendix I above, as to the value of such comparison, unless policy makers do intend taking note of the results, and unless in any case the schools' market is opened up to competition and to the free interplay between parental choice and schools' response.

Page 8

"That the Government redirect a significant proportion of the resent funding for the Education Review Office to schools."

"That the Education Review Office establish, within a substantially smaller operation of around 150 people, a central methodology group and a review field staff, each with their own specialised areas of accountability."

I would endorse that the funding now allocated to the ERO should go to the schools, should indeed have gone to the schools. I would doubt the need for the reduced operation of the ERO as recommended here.

Pages 8 and 9

The review team asks for the role of the Ministry of Education to be reduced, but are still willing to afford too much power and responsibility to the centre. As I have said earlier in this report, the role of the Ministry should be minimal, or even nil.

Page 9, Special Education Service

The review team have reviewed the role of the Special Education Service (pages 45-48) and amongst their recommendations say,

"That the Board of the Special Education Service provide for contestability inservice delivery within twelve months of its establishment in its new expanded role."

Again such does not go far enough. The extra money needed for a child with special education needs should go with the child, thus affording the opportunity to the parents, the school, private as well as public provision, to select and provide the best possible education for that particular child. The review team are still willing to give the Special Education Service a dominant role. I would not.

Page 10, Teachers' Advisory Service

The recommendation is,

"That a mechanism should be devised for making these services contestable at the earliest possible date."

Again I agree, such does not need be, nor should it be, a public monopoly.

Much of the report and its recommendations point in the right direction, but I do believe the review team could have been more bullish in returning to the concepts of Picot, and more quickly.

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