



Briefing Note: Background reading for a review of Tomorrow's Schools

To:	Hon Chris Hipkins, Minister of Education		
Date:	15 December 2017	Priority:	Medium
Security Level:	In Confidence	METIS No:	1093090
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Summary

- This briefing provides an overview of the "Tomorrow's Schools" reforms; the social and economic context of the reforms and subsequent developments; and the key themes and system shifts since the 1989 reforms.
- Part One provides an overview of the 'weaknesses in the education system' identified by the Picot taskforce in the report *Administering for Excellence* (1988). It provides an overview of the 4th Labour Government's response to this report in *Tomorrow's Schools*, which accepted the majority of the Picot taskforce's recommendations for reform. It also sets out those of the Picot taskforce's recommendations and subsequent reforms that were not implemented.
- Part Two covers the broader social and economic context of the reforms and subsequent periods.
- Part Three outlines the key themes and system-shifts since the 1989 reforms and sets out some of the enduring high level system challenges that could provide a framework for further work in outlining the scope of a review of "Tomorrow's Schools".



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15/12/17

PART ONE: THE CONTEXT OF THE REFORMS

The Picot Taskforce and Tomorrow's Schools Reform

1. Administering for Excellence (1988) was the report of a taskforce headed by Brian Picot. The taskforce was made up of senior public officials from three government agencies, business leaders, senior teachers with extensive experience in the education system, and a senior lecturer from the University of Waikato.
2. The Picot taskforce identified 'serious weaknesses' in New Zealand's education system. In response, the taskforce recommended an extensive program of reform. The key recommendation would be the creation of self-managing schools. The taskforce was commissioned in an era of major structural reform of the New Zealand public sector, aimed at improving the accountability and responsiveness of the public sector.
3. Four months after the release of *Administering for Excellence*, the Government released its response, *Tomorrow's Schools*, which accepted the taskforce's view that the education system was outdated and inflexible. The government gave legislative effect to the majority of the taskforce's recommendations for education system reform, in 1989, and implemented them from 1990.

Bird's Eye View: The Schooling System Pre-1989

4. Before 1989, the Department of Education (DoE) had extensive responsibilities in the education system. The DoE was responsible for a wide range of academic and administrative matters, advisory services, in-service training, the Inspectorate, school publications, school staffing, teacher registration and discipline, and carried out government policy for all non-private learning institutions at primary and secondary level. It also made major administrative decisions, such as capital works, new schools, and school closures.
5. A network of decision-making boards linked the DoE to primary and area schools across New Zealand. Boards acted as a conduit between the central state funding apparatus and the local delivery of education in a particular region. Education Boards were responsible for primary schools. Boards of Governors were a separate administrative structure, responsible for individual or small groups of secondary schools.
6. Boards were responsible for virtually all decisions at the schooling level, and frequently referred matters to the central office in Wellington to ensure compliance with nationally set laws, policy and procedures. A lack of separation between the department's policy and delivery functions meant that the Minister of Education was frequently involved in administrative matters.

The Picot Taskforce: What they found

7. For the Picot taskforce, the education system suffered from an over-centralisation of decision-making power and a systemic lack of effective management practices. This undermined the ability for parents and communities, as well as those working within the education system, to make informed choices and effective decisions. This resulted in a widespread sentiment of disempowerment and undermined the ability to influence the education system. Ultimately, the education system was found to be unresponsive, unaccountable, and did not place educational aspiration at its centre.
8. The Picot taskforce identified five major issues in the education system: These issues are summarised below:
 - a. Over-centralisation of decision-making.

- b. Complexity.
- c. Lack of information and choice.
- d. Lack of effective management practices.
- e. Feeling of powerlessness among parents, communities and practitioners.

Over-centralisation of decision-making

9. The Picot taskforce raised concern at the degree of centralised decision-making power held by the DoE. All local decisions were subject to centralised law, rules and procedures, which had a range of adverse consequences:
 - a. Decisions were made without local context in mind, and resulted in considerable delay in routine administrative matters at the board and school level.
 - b. A concentration of decision-making power made the DoE more susceptible to 'capture' by interest groups – giving disproportionate influence to sector interests, over less resourced groups such as parents and communities.
 - c. An inappropriate relationship between policy advice, and delivery functions within the DoE. Public servant involvement and experience within the education system meant that they identified strongly with providers of education – this undermined officials' capacity to provide impartial policy advice.
 - d. Ministers were excessively involved in administrative matters. This created confusion about who held decision-making responsibility for various matters.

Complexity

10. The Picot taskforce also found the administration of education to be overly complex and divided. In summary, the Picot taskforce found that:
 - a. Complexity and division across education institutions lead to differences in salary structures, training programmes, appointment and promotion schemes, grant formulae, and control structures which had little justification on educational grounds.
 - b. Decisions were made in isolation, without consideration of the impact on other sectors. For example, funding decisions made for teachers colleges, without regard for university funding levels.
 - c. Complexity and a lack of co-ordination led to widespread duplication of services.

Lack of information and choice

11. Both deliverers and consumers of education were unable to make effective decisions. A significant part of this was a systemic lack of information availability:
 - a. Basic information about entitlements, rules and criteria were often difficult to find. Staffing and salary decisions were not easily queried or understood.
 - b. There was difficulty in obtaining information about where and how schooling decisions were made. For example, teaching performance issues involved the principal, the school committee, the education board, and the inspectorate – with none having clear responsibility.
 - c. A lack of information about the performance of schools. For example, parents and communities had little access to any definitive information about learning standards and achievements within schools. This undermined the ability to compare schools and make judgements about performance.

- d. Education institutions were often constrained by centrally prescribed decisions about resourcing. This undermined their ability to make the best decision for their particular schooling context.

Lack of effective management practices

- 12. The taskforce also concluded that DoE administrative structures relied heavily on the personal integrity of officials, rather than effective managerial structures, systems and processes:
 - a. Blurred responsibilities within the DoE meant that there was little separation of policy making and delivery functions. This undermined officials' ability to robustly evaluate policy and resulted in a commitment to preconceived ideas, rather than those based on merit or effectiveness.
 - b. The conflation of policy making and implementation undermined officials' ability to maintain a detached stance. This made it difficult to discern the 'priorities of the centre', from the preconceived priorities that came from sources external to the DoE. In turn, this undermined their ability to advise a course of action that would yield the best return on government funds.
 - c. The DoE's performance was measured by the capacity of officials to 'win resources' for the education system, rather than the effective employment of those resources towards educational objectives.
 - d. Policy advice had little to do with Ministerial priorities. Papers gave little indication of the key issues and priorities and virtually no supporting argument, advice or research to guide the Minister. Instead, official advice was more concerned with capturing inputs and financial resources for the DoE.

Lack of accountability

- 13. A lack of effective management practices meant that objectives and priorities were undefined and unclear, and there was no clear responsibility for the use of resources. This undermined the ability to hold individuals accountable for achievement against specific objectives.
- 14. The education system operated largely as a centralised system of control. This meant it was necessarily operated by rules, set procedures and statute to reduce the number of decisions that officials had to take. Such a degree of regulation produced inflexibility and inhibited overall coordination and responsiveness.

Few incentives to manage effectively

- 15. There was a systemic lack of effective management practices within the DoE and across the education system. Authorities had little ability or incentive to prepare mission statements and define priorities to guide action.
- 16. Adverse incentives were identified, where in some cases, successful performance was punished. For example, a principal – through good teaching and management practices – might attract enough pupils to turn a two teacher school into a three teacher school. However, if the principal did not have the personal grading to hold the principalship of a three teacher school, they would have to move schools.
- 17. A lack of spending flexibility undermined the ability to manage resources effectively. Compartmentalisation of funding meant that institutions had little discretion over how they used their resources. For example, a school facing literacy problems had no ability to underspend its sports budget, and use the spare funding to fund literacy programmes.

Inadequate property management

18. Property resources were being managed ineffectively, with no incentive to systematically evaluate the most efficient decisions with regards to property resources.

Restrictions on financial planning

19. There was little capacity in the education system to make financial commitments beyond the current financial year.

Feeling of powerlessness

20. A widespread sentiment of consumer dissatisfaction and disaffection was the final finding of the Picot taskforce. The taskforce considered sentiments of powerlessness manifested themselves in a number of ways:
 - a. Communities felt unable to influence the education system and frustrated by unresponsive and inflexible education institutions.
 - b. Many in the education system felt confused and uncertain about how to navigate its systems and processes.
 - c. There was a widespread sentiment that the system only served particular interests.
 - d. There was a sense of alienation by many in the education system – Māori and Pasifika were not adequately served by the education system, and were disproportionately represented among failing groups.
 - e. Those working within the system often encountered inflexible processes when trying to make positive change.

The Picot taskforce's recommendations for reform

21. In response to these weaknesses, the Picot taskforce recommended major education system reform. The taskforce recommended the replacement of the Department of Education with a Ministry of Education, and the abolition of regional boards. All schools were to become autonomous, self-managing learning institutions, controlled by locally elected boards of trustees, who were responsible for learning outcomes, budgeting, and the employment of teachers.
22. Each institution was to produce a charter outlining the school's mission in relation to its community, incorporating centrally prescribed requirements of safety, equity and national standards.

Tomorrow's Schools

23. *Tomorrow's Schools* was the 4th Labour Government's response to the Picot report. Tomorrow's Schools accepted virtually all of the taskforce's recommendations.
24. The major institutions established under the *Tomorrow's Schools* reforms were:
 - a. A Ministry of Education
 - b. A Review and Audit Agency (now ERO)
 - c. Boards of Trustees
 - d. Special Education Service
 - e. Education Service Centres
 - f. Community Education Forums
 - g. Parent Advocacy Council
 - h. Teacher Registration Board
 - i. School Publications.

Ministry of Education

25. A Ministry of Education would be established with two key functions:
 - a. To provide policy advice to the Minister on all aspects of education.
 - b. To oversee the implementation of national policies approved by the Minister.
26. It was not to become a direct provider of education services, though it would contract other agencies and individuals to provide certain services. The Ministry was to be accountable, through a chief executive officer, to the Minister. The Ministry would decide whether it wished to establish a local presence in some districts. However the purpose of this local presence would not be to establish lines of control to the Ministry.
27. The Ministry would include, amongst its functions:
 - a. The establishment of national guidelines for education.
 - b. Responsibility for setting national curriculum objectives which would form part of the national guidelines for education.
 - c. Recommendation for approval of charters to the Minister (and advice to institutions on preparation of initial charters if requested).
 - d. The ownership of educational property and responsibility for capital works.
 - e. Funding of all state owned institutions.
 - f. Responsibility for payments in case of major vandalism, fire, flood and earthquake damage.

Review and audit agency (now ERO)

28. A review and audit agency would be an independent body, established to ensure that institutions were accountable for the government funds they spent, and for meeting the objectives set out in their charter. The review and audit agency would also comment on the performance of other elements in the system.
29. The review and audit agency would review institutions through teams with expertise in curriculum, finance and management support, and equal education opportunity. Each team would also include a community representative and a principal from another institution.
30. Reviews of institutions would take place on a two-yearly basis. The objective of the reviews would be to help boards meet their objectives and review their own performance. The review team would produce a report which identified strengths and weaknesses of the instruction and its administration, and make recommendations for improvements.
31. If the agency found serious deficiencies in the management of the institution or in the achievement of its students, persistent underperformance could lead to the dismissal of the trustees. The board would send an annual set of financial accounts to the review and audit agency.
32. Special reviews would also be able to be undertaken in instances where there was public disquiet or concern about an institution's performance. Special reviews could result in:
 - a. A requirement for the board to take a specific action.
 - b. The dismissal of the board and a new board being elected.

- c. The dismissal of the board and a statutory manager being appointment in its place until a new board is elected.
33. Those conducting reviews would not have another function. In particular, they would not take on responsibility for advice and guidance to institutions, apart from any recommendation they wished to make on the progress of institutions.

The Board of Trustees

34. The 'basic unit' of education administration would be the individual school. Each school would be under the overall policy control of a board of trustees, with the principal being responsible to the board for implementation of the board's policy.
35. Boards would be responsible for the broad policy objectives and the effective and efficient running of the school. The board would be expected to be responsive to community educational preferences and to set programmes and courses to meet them, within national guidelines set by the Ministry of Education.
36. A school charter would provide a platform for communities, parents, staff and the principal to set the overall direction for a school – set within national guidelines. It would also reflect the knowledge, skills, attitudes, and values of the institution, and the standards to be achieved within the national guidelines.
37. The charter of each school would be approved by the Minister on the recommendation of the Ministry and the charter would then provide a contract between the state and the institution, and between the institution and community.

Accountability

38. The board would be required to report regularly to its community on the objectives of the institution's charter, and how well they were being achieved. The board would be formally reviewed by the central Review and Audit Agency every two years.

Responsibility for property

39. Where the Crown owns education property, responsibility for maintenance and capital works would be split between the board and a property unit from the Ministry.

Administrative services

40. The board would be able to hire administrative services as it required. Education Service Centres (discussed below) would be able to provide full administrative services for boards if required.

Teaching positions within institutions

41. The board would be the legal employer of staff, and would appoint the principal and approve appointments of basic scale teaching staff on the recommendation of the principal. The board would determine starting salaries.
42. Appointment of the principal would be on contract within a salary range established nationally, with contract terms negotiated with the board. Teachers would be employees within salary scales established nationally.

Funding

43. All funding would come to institutions as a bulk grant. The bulk grant would have two main components – teaching salaries and operational activities – each based on its own

separated funding formula. The formula would be sensitive to the varying needs of different institutions in different areas, and would be weighted for equity considerations.

Budgets

44. Funding for all of an institution's activities would be calculated on the basis of nationally determined formula – to be sent directly to schools as a bulk grant – with the exception of teacher payroll. Final responsibility for funding allocation would lie with the board.
45. The board would also be responsible for the preparation and audit of the institution's certified accounts and provided to the Review and Audit Agency.

Special Education Service

46. A Special Education Service would also be created. This would be a standalone body, which would be contracted by the ministry to provide special education services to schooling institutions.
47. Special education teachers, who were specialists involved with individual children, would either be attached to host institutions (or funded under contractual arrangements with the Ministry) or be directly employed by the Special Education Service.
48. Schooling institutions would be able to use services provided by agencies or individuals other than the Special Education Service. The Special Education Service would not be monitored directly, but its supply of services will be monitored through the review and audit agency's review procedures for individual institutions:
49. Policy advice on special education would be provided by the Ministry.

Education Service Centres

50. Education Service Centres would be one source of administrative services available to education institutions. The range of services provided by Education Service Centres would depend on the needs of the institutions, but could include administrative support, assistance with budgets and pricing, accounting services, and management advice. Schooling Institutions would be free to choose whether it used the Education Service Centres or bought services elsewhere.

Community Education Forums

51. Each individual institution would be responsive to its community through its charter. Additionally, communities would be able to express their views through Community Education Forums. These forums would be informal and advisory, set up on the initiative of the community – acting as the official voice of the community on education matters.

Parent Advocacy Council

52. The Picot taskforce recommended an independent Parent Advocacy Council be established to promote the interests of parents at all levels of education.
53. The council was not to become involved in complaints about the day-to-day running of institutions. The role of the Parent Advocacy Council would be one of "last resort" – as such, it would be limited in its functions to:
 - a. Disseminating information about the education system and the rights and obligations of those in it.

- b. Helping groups and individuals whose needs are not being met or listened to elsewhere in the system – for instance, at the local institution or community education forum levels.
 - c. Assisting parents who wished to educate their children at home, or to wished to set up a separate school.
 - d. Representing and promoting the interests of parents generally.
54. The Parent Advocacy Council would be accountable directly to Parliament, through an annual report. The Council's members would be appointed by the Minister – and its membership would ideally reflect the ethnic, gender and income composition of New Zealand's population.

Teacher Registration Board

55. A Teacher Registration Board would be a small independent body, responsible for determining the conditions and requirements under which teachers would be registered.
- a. It would be responsible for approving registration and for administering a register of teachers.
 - b. It would decide if a teacher's name was to be removed from the register, and would determine the conditions under which this could occur.
 - c. The Teacher Registration Board would represent teachers, and would be funded by the teachers themselves.

School Publications

56. The Visual Production Unit would be brought together under a single business unit outside the ministry, to be called School Publications.

Picot Recommendations not taken forward in *Tomorrow's Schools*

57. The only major Picot taskforce recommendation rejected by the government was the creation of an Education Policy Council. The Education Policy Council was to consist of eight members, made up of senior Ministry staff and four independent people appointed by the Minister. Education sector groups would elect two of the four independent councillors.
58. The role of the council was:
- a. To provide overall policy advice to the Minister on all educational issues including the setting of national education objectives.
 - b. To monitor the social environment to ensure that policy developers, administrators, and providers of education met the special, educational, and economic requirements of the education system.
 - c. To evaluate the impact of current policies and to develop new policies.
59. The council was to be provided with secretariat support by the Ministry of Education, and have access to any Ministry information or support that it required. It was not to have any role in the administration of the education system or in the implementation of the Minister's education policies.

Why wasn't the Education Policy Council Implemented?

60. *Tomorrow's Schools* does not provide a rationale for not including the Education Policy Council. However, Wylie (2012) argues that the inclusion of sector interests on the

council – and subsequent involvement in policy development – would have been inappropriate, and counter to the overall objective of improving responsiveness to the Minister.¹

Tomorrow's Schools: Institutions that didn't survive in the new system

61. There were three major institutions that were included in the *Tomorrow's Schools* agenda, but only lasted for several years in the newly reformed education system.
62. The major institutions that did not 'survive' were:
 - a. **Parent Advocacy Council** –soon after the creation of the Parent Advocacy Council, it was recognised that many of the Council's functions could be fulfilled by other agencies and avenues, such as the Ombudsman, the Human Rights Commission, the Ministry and the media. It was subsequently disestablished in 1991.
 - b. **Community Education Forums** – Community Education Forums did not prove widely popular with communities and families. The community and partnership focus that was supposed to emanate from the forums, was subsumed by a dynamic of competition between schools². Fewer than half a dozen forums were convened.
 - c. **Education Service Centres** – Many Education Service Centres became unviable several years after being established and today there are only two left. Schools often opted for in-house provision of services, which could be done more cheaply than through service centres.
 - d. **School Publications** – School publications became a Crown company called Learning Media, but it did not prove to be a commercially viable entity and was disestablished in the mid-1990s.
 - e. **Special Education Service** – The Special Education Service was originally created as an independent crown entity, as set out in *Tomorrow's Schools*. However, concerns about provision persisted into the mid-1990s. In 1996 major funding changes were made under Special Education 2000 reform. However, this failed to result in adequate improvements to service quality and inclusiveness in schools. The Special Education Service was disestablished in the early 2000s, and its functions were incorporated into the Ministry of Education.

Aspects of Tomorrow's Schools Policy that did not eventuate

63. Below is a list of policy aspects included in *Tomorrow's Schools* that do not appear to have been implemented.

Boards of Trustees

- Early Childhood services would also have a board of trustees and be run along the same lines as schools.

¹ Wylie notes that, "an overall steering and evaluative advisory group on the big picture of educational policy, which included the sector, had no place in the new era of the public sector, with its emphasis on chief executive accountability through performance-based contracts ..." (p. 85) Wylie, C. (2012). *Vital connections: Why we need more than self-managing schools* / Cathy Wylie. Wellington, N.Z.: NZCER Press.

² Mansell, R. L. (1993). *Community forum on education in Wellington's eastern suburbs: A case study on choice and democratic community participation in New Zealand education policy*. Unpublished master's thesis, Victoria University of Wellington.

- One board co-opted member could be a teacher. This was in addition to the staff representative. Current legislation prohibits any permanent member of staff being co-opted and prohibits more than one non-permanent member of staff being a co-opted member.
- Boards would be elected on a two-year election cycle with 50 percent of trustees being re-elected at any one time.
- The possibility of up to 6 days unpaid leave for board of trustee members would be investigated.
- Appointment of the principal and senior teachers would be on a contract, with the term to be negotiated between the board and the principal/teacher.

School Charters

- The charter would be approved by the Minister on the recommendation of the Secretary. Charters are currently reviewed by the Secretary but to ensure that they have been developed in accordance with the Act and the NAGS. The Education Update Act 2017 requires the Secretary to approve the new strategic plan that replaces the charter.

ERO

- Would undertake two-year ERO review cycles.
- NEGS would include a code of conduct for boards, including dispute resolution processes. The original NEG's did contain both a Board code of conduct and a principal code of conduct. These were in force until April 1993 when they were replaced.
- ERO reviews would include EEO performance.
- ERO would review specialist education services, the teachers' colleges provision of advisory services and the MOE's provision of policy implementation.
- ERO teams would have a community representative and a co-opted principal.
- ERO reports would recommend improvements and be followed by a follow-up visit one term later. If there were serious deficiencies, ERO could schedule a third review six months after and this could lead to the dismissal of the board of trustees.
- ERO was to grant home-schooling and other exemptions and home-schooling would be reviewed by ERO.

Teachers

- Appointments above the basic scale were to be on the recommendation of an appointments committee, of the principal, the board chair and a teacher from another school.
- Positions to be known as "teachers of outstanding merit" would be established for those not wishing to take up a leadership position. Such teachers have to have at least 10 years service and ERO would choose them.
- National Guidelines would set maximum and minimum teacher:pupil ratios.

- National Education Guidelines would contain a section on the objectives and strategies for equal employment and equal-educational opportunities. These were removed in 1993.
- The government would determine the number of teacher trainees it will fund.
- Teacher's centres and education centres would be attached to teachers colleges and after two years their funding would be transferred to schools and they would become contestable.

School Funding

- All the resources, both staffing and operational funding, would be bulk funded.
- Boards would be able to borrow money commercially but limited to the amount of the bulk grant.

Principals

- National Education Guidelines would have a Code of Conduct for principals. This was removed in 1993.

Special Education Services

- 20% of special education funding to be allocated to schools and this to move to 100% after two years and SES services would become contestable.

Transport

- School transport contracts would pass to individual schools over time. There has been very little take up of this over time, and the majority of transport contracts are managed by the Ministry.

Property

- To promote the better use of the property assets, an incentives package would be designed by the Ministry.

Correspondence Schools

- The Correspondence School would be able to charge schools a tuition fee when a student is enrolled at a school and is receiving tuition from the Correspondence School.
- Home-schoolers would have a charter.
- The creation of community schools, which would be a mix of ECE, schooling and community education.

Advisory services

- There would be a review with a view to making the advisory service to move to full cost recovery after two years and funding would go directly to schools.

PART TWO: SOCIAL & ECONOMIC CONTEXT for EDUCATION REFORMS

64. This Part describes the wider social and economic context that surrounded the Tomorrow's Schools education reforms, and key changes that have occurred since.

Leading into the 1989 Reforms

65. Prior to the mid 1980s, New Zealand enjoyed a long history of high employment. This prosperity was underpinned by a strong trade relationship with the United Kingdom and a highly protected economy. However, in the first half of the 1980s, a combination of oil price shocks and global agricultural protection brought harsh new economic realities to New Zealand. As a result, major levels of external indebtedness occurred, along with growing fiscal deficits, rising inflation and low growth.
66. The Government responded with a policy of deregulation of the domestic economy and dismantling of a range of subsidies and protections to domestic producers. Partly in response to fiscal pressures, and as part of the wider micro economic reforms, major reforms to the public sector were undertaken in this period. State trading activities were commercialised and many were privatised.
67. The education system was also part of these widespread reforms. The education reforms were essentially about reforming the public administration of the education system in order to improve its responsiveness and effectiveness. Moving to a market driven system was not an explicit objective of the education reforms. This was evidenced by the title of the review "Administering for Excellence", that led to "Tomorrow's Schools"³. The core logic of the reform was that devolving decision making to locally elected Boards of Trustees would lead to improved education outcomes and community aspirations being realised in schools.

Changes over Time

68. Since *Tomorrow's Schools* reform and the major devolution of the schooling system, New Zealand's economy and society has changed dramatically. The following section outlines some of the key socio-economic changes that the education system is facing in the 21st Century.

Changing demographics

69. The New Zealand population is increasing through immigration and is increasingly diverse, with Asian, Māori and Pasifika populations growing, while the Pākehā population is decreasing (particularly the school-aged population). People are becoming increasingly concentrated in urban centres while some isolated or rural areas are and will continue to experience declining populations. These changes also bring increased socio-cultural diversity (including ethnic, cultural, sexual, religious, linguistic, family status and values), which will have impacts on social cohesion and communities. The education system is directly impacted by these changes to school-aged populations, workforce makeup and diversity of curriculum needs.

³ The section "leading into major reform" is paraphrased from a speech given by Howard Fancy in the early 2000s on New Zealand's economic and education reforms of the late 1980s³- titled "EDUCATION REFORM: REFLECTIONS ON NEW ZEALAND EXPERIENCE. Fancy was the Secretary for Education from 1996 to 2006.

Supporting Māori aspirations

70. Supporting Māori aspirations has become a core priority of the New Zealand education system. Māori have a unique place in Aotearoa/NZ and are a key part of our society, culture and economy. The Treaty of Waitangi commits the Crown to work in partnership with Māori and to support Māori aspirations, which has contributed to a growing number of relationships with iwi and Māori, increasingly including post-settlement iwi. Crown-Māori partnerships are being formed to give Māori a greater role in co-construction and design of systems for social and economic development, natural resource use and the improvement of life outcomes for Māori. The education system is uniquely placed to reflect and support Māori aspirations, through fostering Māori identity, language and culture and enabling Māori to succeed as Māori.

Population shifts and Rapid urban growth

71. Auckland is growing at an unprecedented pace as a result of birth rates and significant internal and international migration. Current approaches might no longer be sufficient to meet the scale of growth and address the disparity in educational achievement. For instance, by 2027 about 59,000 more school-aged student places will be needed in the Auckland schooling network. This growth is placing increased pressure on infrastructure, transport, teacher workforce and the schooling network in a very short timeframe. The education system needs to remove barriers to meet the demands of growth and ensure learners in rapidly growing urban environments can achieve excellent and equitable outcomes.
72. Other areas, many of them rural, such as the West Coast, Southland and the East Coast are suffering from population decline.

New or persistent social pressures

73. The social pressures New Zealanders face are changing and may be intensifying. New Zealand has significant, persistent rates of disadvantage and social inequality, which are associated with poor education outcomes. Younger age groups continue to access mental health, bullying and obesity services, while some communities including Māori, Pasifika, and those that identify as LGBTQIA are more likely to be affected by mental health issues. For some of these groups the risk of severe mental health issues and associated consequences is particularly high, for example the highest suicide rate is for Māori males aged 15-24. There is also a focus on lifting social cohesion by improving the integration and wellbeing of potentially marginalised groups including Māori, Pasifika, LGBTQIA+, international students, migrants and learners from refugee backgrounds.
74. The education system is uniquely placed to interact with and mitigate some of the impacts of these factors by working alongside agency partners, NGOs, communities, industry and other actors. The education system cannot operate in isolation to address these wide-ranging social pressures.

Changes in valued skills

75. New Zealand workplaces are responding to rapid changes across the population and in technology by shifting their ways of working and adjusting their expectations of workers. To keep pace, workers need to be adaptable and have a diverse range of skills.
76. While there will always be a need for learners to gain specific skills for defined jobs, there is an increasing focus on the role and importance of transferable skills in the workplace. These include the behaviours, beliefs and personal qualities such as communication, self-management and resilience that support employability across the

labour market. Workers also need to be engaged with learning throughout their lifetimes, as they change careers, re-train, and up-skill while in work to meet the changing demands placed upon them.

77. The education system has a role in identifying and building the skills and competencies that enable learners to participate and thrive in the economy and across society, and to be lifelong learners. This begins in childhood, and must be supported by strong relationships across and between government, early childhood education providers, schools, tertiary providers, learners and their families and whanau, the wider community, industry and employers.

Rapid, disruptive technological change

78. The exponential rate of transformative technological change is disrupting traditional practice. We are seeing more traditionally face-to-face interactions – including learning – starting to shift online and emerging technology providing opportunities for improved analysis of information at an increasingly granular level. Changes to technology and connectivity can also provide more flexibility for individuals' learning to suit their own pace and enable them to access and share quality online resources that suit their learning styles, regardless of their location.
79. The education system has the opportunity to use transformative technology to improve the delivery of education, enable learners to become digitally competent for the future environment and lift learner outcomes through greater personalisation. The education system needs to leverage technology effectively because while it can reduce inequality across the system and improve outcomes, inconsistent uptake across schools could also widen the disparity in access to modern education.

Global connectedness

80. New Zealand exists in an increasingly connected global society and needs to strengthen global connections to succeed. We participate in and connect with more global economies and are signed up to international agreements, obligations and education cooperation arrangements that enable us to share and learn from best practice. Globalisation contributes to greater cultural and economic exchange taking place, with increasing numbers of international students coming to New Zealand and more New Zealand students studying abroad.
81. The education system has a role in helping New Zealanders build the competencies, skills and tools they need to participate and succeed in a more connected global society, and to grow strong global and local communities.

PART THREE: KEY THEMES AND SYSTEM SHIFTS SINCE THE 1989 REFORMS

82. This section describes the many changes in the education system since the 1989 reforms. We describe the progression of changes in the education system under seven broad themes. Finally, we outline some possible enduring system issues for consideration in further work.

Autonomy

83. Before 1989, the New Zealand education system was highly centralised and government had a key role in the provision of education through the department of Education. Particularly at Primary School level, there was little autonomy at the school level.
84. Education Boards governed state and state integrated schools, and Boards of Governors governed secondary schools. Staffing and funding levels were set nationally, and administered by the boards who were the employers of teachers and principals⁴. Teacher appointments were decided by district appointment committees, with representatives from the Education Boards, the inspectorate and the New Zealand Educational Institute (NZEI). Principals had no say in the appointment of teachers⁵. Accountability was for inputs rather than outcomes.
85. Under "Tomorrow's Schools," the governance of schools, especially that of primary schools, passed from regional/central bodies supported by public servants to elected parent representatives. There was no longer a body between the school and the central organisations and a broad range of functions and duties were devolved to individual school boards of trustees. These included employment of staff, allocation of staffing and funding, management of school property, and other administrative duties, as well as oversight of the education of students. The accountability mechanisms were set out clearly, such as two year ERO reviews with a focus on finance and management as well as curriculum.
86. The board of trustees' model of an elected board governing one school has remained relatively unchanged since 1989. In 2017 the duties of boards of trustees were expressly set out in legislation for the first time. The primary duty of boards is to "ensure that every student in the school is able to attain his or her highest possible standard in educational achievement."
87. The "Tomorrow's Schools" reforms established a charter as the main accountability document. It was designed to enable communities to hold schools to account for achieving the objectives set out in the charter. These objectives were to describe how the school would carry out the goals and administrative requirements that were set by the Minister in the National Education Guidelines (NEGS) and the National Administration Guidelines (NAGS). Annual reports audited by the Auditor General, board elections and Education Review Office reviews were designed to support accountability for the achievement of charter objectives.
88. In 2001, a more structured planning and reporting framework was introduced for schools, including the concept of a strategic plan. The recent Education (Update) Amendment Act 2017 seeks to improve the planning and reporting system for schools by focussing it on educational outcomes.

⁴ Picot, B., & Dan Long Memorial Library. (1988). *Administering for Excellence: Effective Administration in Education : Report / of the Taskforce to Review Education Administration*.

⁵ Wylie, C. (2012). *Vital connections: Why we need more than self-managing schools* / Cathy Wylie. Wellington, N.Z.: NZCER Press.

Role of the centre

89. The reforms created a number of Crown entities and a new government department (ERO). This was to separate out policy, delivery and accountability functions. Some of these Crown entities have been disestablished and their functions returned to the Ministry.
90. There are now four key agencies at the national level. ERO is the main accountability agency responsible for evaluating and reporting on the quality of education. The New Zealand Qualifications Authority (NZQA) ensures that qualifications obtained in New Zealand are robust and credible. The Teacher Registration Board has moved from being a Crown entity to a statutory body (the Education Council of Aotearoa New Zealand), which provides professional leadership for effective teaching and teacher education. The Ministry of Education was established by the "Tomorrow's Schools" reforms as a policy agency, but since 1989 has gradually increased its regional capacity to provide advice and support for schools. In 2002, the Ministry reacquired responsibility for the provision of many special education services.

Students at the Centre

91. The 1989 reforms assumed that, if accountability structures were right, and parents were involved in school governance, students would receive a good education.
92. The curriculum developments of the 1990s shifted the focus towards putting students and their learning at the heart of the education system. Prior to the 1990s, school curricula were set through more than a dozen syllabi and guidelines. These documents were developed for individual subjects over 25 years (1961 to 1986), and covered different year levels. These documents described what teachers would teach in respect of each subject and year level. There was no overarching approach to their development and no coherent vision or purpose.
93. After 1990 a coherent national outcomes-focussed curriculum framework was developed. The new framework sets out the foundation policy for learning and assessment in schools. It established principles, identified the essential learning areas, skills, attitudes and values, defined the national achievement aims and objectives for all students, and set in place assessment procedures.
94. The current national curriculum was developed between 2000 and 2007, following a curriculum stocktake. This curriculum reflected:
 - a. A better understanding of Māori education needs and aspirations.
 - b. New research on pedagogy to improve student learning outcomes.
 - c. Increasing use of technology.
 - d. Recognition of the importance of balancing social outcomes with academic achievement.
95. Development of the first Māori curriculum statement (*Te Marautanga o Aotearoa*) followed the development of the English medium curriculum, partly because of the limited capacity within the education sector to teach in te reo and partly because of new policy considerations on how a Māori curriculum should be taught.
96. In 2017, the Ministry further developed the technology learning area to be more explicit about digital technologies to equip children and young people for an increasingly digitised workplace and society.

Equity

97. Equity was expressed as one of the principles behind "Tomorrow's Schools", but the assumption appears to have been that getting the right structures and parental involvement would be enough to realise it. For example, "Tomorrow's Schools" acknowledged that there should be opportunities made available to parents who wished their children to learn or be educated in the Māori language. It saw this as being accomplished through Māori parents being on boards of trustees; home-schooling; or establishing their own school. Parents could request that their children receive instruction in te reo Māori and tikanga.
98. The first NEGs had objectives and strategies for equal employment and equal educational opportunities but these were removed in 1993.
99. In practice, there are a number of barriers that limit parental participation on school boards, including the time commitment required, the unpaid commitment needed, the cultural responsiveness of board processes, increased paid work commitments for many families, and the level of knowledge needed to govern the full range of educational services delivered by schools.
100. Pasifika students are only mentioned in passing in the Tomorrow's Schools reforms.
101. Before 1989, there were limited educational opportunities for children and young people with special education needs. In 1987 the Education Act 1964 was amended to provide students with special education needs with the same rights of enrolment in the state system as all other students. In order to manage the transition, this legislation did not come into effect until 1990.
102. In "Tomorrow's Schools," learning support matters were mostly restricted to creating a separate Crown entity (the Special Education Service) to bring together many of the services for children with special education needs that had previously been provided by the Department.
103. In the 1990s, "Special Education 2000" reformed the funding and delivery of special education. This accompanied a general move in education from focussing on what was wrong with the child or young person to how social and physical environments could be adapted to help learning.
104. In 2002, the Special Education Service was disestablished and its functions passed to the Ministry of Education. Since that time the focus has been on improving the way that services are delivered and on developing a fully inclusive education system. We are undoing the often artificial distinction between special education and other forms of learning support.
105. The decile system was introduced in 1993. It applied a weighting to some elements of the operations grant to compensate for ongoing patterns of under achievement among schools in lower socio-economic areas.
106. Developing a system that provides the best opportunities for all learners has become more important since that time and is now a central concern. The focus on meeting the needs of all learners to achieve to the best of their potential has become the primary duty of boards of trustees, and the objectives for education that the Minister must take into account in developing a statement of National Education Priorities are centred on outcomes for all students.

Contribution to broader society outcomes

107. "Tomorrow' Schools" was a review of administration and focused very much on the education system and its structures. It only touched lightly on student welfare; with what happened to students after they left school; or with how schools might work with other agencies to support students.
108. Since that time an increased understanding about student well-being as a key to engagement and learning has developed, and the emphasis on lifelong learning and better transitions to the world of work and further study has grown considerably. In addition, there has been closer liaison with the work of social agencies to support the whole child.
109. Until the 1970s the concept of wellbeing was most closely associated with physical wellbeing and health. It was not until the 1993 New Zealand Curriculum framework that the system acknowledged that health is vitally important for achievement and encompasses physical, social, emotional, intellectual and spiritual dimensions.
110. Since 2000, there have been a wide range of legislation and government interventions that include elements focused at improving student wellbeing.
111. Over the last three decades, major developments in the senior secondary area have been in response to changes in society and the labour market. With rising unemployment and a changing labour market there was a strong impetus to develop other pathways from school to employment; and to create second chance learning opportunities. Until the introduction of the National Certificate of Educational Achievement (NCEA) in 2002-2004, New Zealand's national qualifications at senior secondary school supported top academic performers and those bound for university. NCEA has a broader focus on the achievement of all students. The secondary-tertiary interface has widened so that there are more pathways for students into tertiary study.
112. In 1990 Careers New Zealand was established as part of the tertiary reforms to support schools with careers advice. In early 2017, Careers New Zealand was merged with the Tertiary Education Commission to streamline and strengthen the provision of careers advice. There is greater emphasis on students getting guidance at a younger age so that they make educational choices that do not cut off options for later career decisions.
113. There is now more emphasis on learning as a lifelong process. Adequate standards of literacy and numeracy are seen as the foundation for that learning. Increasingly employers seek the qualities that are encompassed in the 'soft skills' of key competencies in the curriculum, rather than simply a demonstration of mastery of subject content.

Choice

114. The reforms brought some increased choice, particularly for Māori-medium education. In the period before "Tomorrow's Schools", Māori medium education was provided only through a few bilingual units and bilingual primary schools. The Education Act 1989 contained two provisions for this. The first was the ability to establish a kura kaupapa Māori as a state school where te reo was the main language of instruction. The second was the ability to establish a school with a designated character that was different from that of a standard state school.
115. In 1999, the Education (Te Aho Matua) Amendment Act required kura kaupapa Māori to operate in accordance with Te Aho Matua. It clarified and codified the role of Te Rūnanga Nui o Ngā Kura Kaupapa Māori o Aotearoa as the kaitiaki of Te Aho Matua and specified where a description of Te Aho Matua was to be found. Designated

character schools have been used for those Māori medium kura, particularly kura-a-iwi, that do not wish to become kura kaupapa Māori.

116. "Tomorrow's Schools" did not introduce any other new types of schools. The most significant change in the way schooling is delivered is likely to be the growth of online tuition.
117. Increased choice was not explicitly a principle behind "Tomorrow's Schools". But devolution intensified competition between schools as parents and schools took advantages of the choice that the system did provide. Enrolment schemes moved from being schemes that covered a number of schools to schemes for individual schools. Competition increased in the 1990s when enrolment schemes were based on schools setting criteria for enrolment. In 2000, new legislation returned to the original concept of a home zone and a ballot for out-of-zone students.
118. The impact on resourcing is a key driver of competition, especially when changing demographics mean that student numbers are decreasing. Schools can go in and out of favour, with some schools growing rapidly and developing waiting lists, while others are below capacity and have little choice in terms of student intake.
119. Communities of Learning | Kāhui Ako is a recent major initiative to encourage schools to work together more collaboratively.

Teaching

120. "Tomorrow's Schools" assumed a skilled teaching workforce and did not address issues around improving teacher quality. It removed regulatory structures around career progression.
121. From the mid-1990s and into the early 2000s, the system focus and the support provided by the Ministry began to shift to what was happening in the classroom. International surveys and ERO reports in the 1990s raised concerns about student achievement, and, by the early 2000s, research clarified the impact that quality teaching could have on learners' progress and what the components of culturally responsive quality teaching are.
122. Quality teaching has the biggest in-school impact on student outcomes⁶. During the 2000s the evidence base about what quality teaching practice comprises continued to be developed. We now know that what works well for students for whom the system has underperformed works well for all students.
123. We have implemented significant changes in the way teachers approach the curriculum, with this also being devolved to the school level within a national framework. There are increased expectations of teachers who are required to have a greater focus on the individual needs of diverse students. There is a much greater emphasis on using data and information to plan the next learning steps for students, classes, and at a school level.
124. Since the late 1990s, the Professional Learning and Development (PLD) system has been redesigned and changed a number of times in efforts to create a greater impact on teacher practice.
125. The reforms fundamentally changed the role of the principal who took on a wide range of administrative responsibilities as well as being the professional leader of the school and the chief adviser to the board. Appointing a principal is one of the most important functions a board of trustees can perform, but there are no specific qualifications or

⁶ OECD Indicators, Harker and Nash, and Alton-Lee.

requirements for eligibility, and PLD is limited. For example, there is no distinction in the Practising Teacher Criteria, or in the Education Council's new professional standards, between the system's requirement of teachers and those of principals, despite the different skill sets needed.

Parents, Family and Whānau

126. Prior to 1989, parents, family and whānau often had only limited involvement in schools. The Picot report observed consumer dissatisfaction in the education system, including a feeling of powerlessness and lack of ability to influence among parents. The Picot report also identified that parents and communities had little access to any definitive information about learning standards and achievement within schools.
127. The "Tomorrow's Schools" reforms considered that parental input at the governance level was the most effective way for parents to influence their children's education. The primary mechanism for this was through a new system of Boards of Trustees. Parents nominate and elect members of the Board of Trustees who are responsible for the governance of schools. Boards of Trustees are accountable to parents and communities.
128. Other changes included:
 - a. A review and audit agency (now the Education Review Office) was established. This continues to play a key role in providing information on schools to parents, families and whānau.
 - b. The introduction of a Parent Advocacy Council. This body was intended to be a forum for parents to raise and address issues. The Parent Advocacy Council was abolished in 1991.
129. Since the *Tomorrow's Schools* reform there has generally been a move away from viewing parental involvement in governance structures as the primary mechanism for supporting and enabling parental involvement in, and influence on, the education system. This shift is supported by evidence that shows that other types of parental involvement may be more effective in leading to improvements to education outcomes.⁷ The original assumption of the *Tomorrow's Schools* reforms was that parental involvement in governance would lead to improved education outcomes, but evidence shows that this does not always occur. Lack of equity and diversity on boards are key issues that the *Tomorrow's Schools* approach, and implementation, did not address.
130. Key shifts have been towards gearing up levers other than governance structures to enable parental involvement, including:
 - a. The provision of information; for example, the Team Up and Te Mana Campaigns in 2006-2007 and the Ministry of Education Parents website.
 - b. Specific programmes and initiatives such as Pasifika Power Up, Reading Together and Whānau Education Action Plans.
 - c. Strategies. For example, one of the five guiding principles of Ka Hikitia – Accelerating Success 2013-2017 is around productive partnerships and understanding that Māori children and young people are connected to whānau.

⁷ For example, the 2009 Best Evidence Synthesis Iteration (BES) *School Leadership and Student Outcomes: Identifying What Works and Why* analysed various types of home-school connection. It found that activities such as parent and teaching interventions and strategies to access family and/or community funds of knowledge had far higher potential to impact positively on education outcomes than a parent role in governance.

Next Steps

131. Below are some of the enduring high level system challenges that could provide a framework for further work on developing the scope of a review of "Tomorrow's Schools":
- a. How to support great teachers in every school and classroom accelerating student learning:
 - With sufficient support and challenge, access to teaching resources and specialist expertise and information.
 - Who are connected to other teachers and experts, creating and using best and emerging new practice.
 - b. How to support and challenge school leaders focused on the business of leading learning, while minimising distractions?
 - c. How to enable an education system in pursuit of equity and excellence that is relevant, supports the individual needs of all children and young people that is culturally responsive and connected to communities?
 - d. How to accelerate progress and optimise learning, for example, through links to early intervention, regular attendance, learning pathways, and advice and guidance?
 - e. How to support networks of self-managing schools, rather than standalone institutions?
 - f. Achieving agreement about the purposes of the schooling system, strengths, weaknesses and priorities for improvement – a schooling improvement focus.