Executive summary

1. We are seeking your approval to release the *Second Annual Interim Evaluation Report - Partnership Schools | Kura Hourua* (PSKH) on the Education Counts website.

2. The Ministry of Education contracted Martin Jenkins and Associates (*MartinJenkins*) to carry out a formative independent evaluation of the PSKH model. This is designed to provide a cumulative overview of how the model is developing and whether the desired outcomes are being achieved.

3. The evaluation is a three-stage evaluation running over four years focusing on eight PSKH that opened in 2014 and 2015. It has three stages: early operation and implementation; creating the conditions for success; and achievement of intended outcomes. A final report is due in late 2017, with annual interim reports. This report is the second interim evaluation report.

4. Year 2 of the evaluation had two parts. Part 1 explored the approaches PSKH are taking to meet the needs of priority students at a broad level. Part 2 explored in depth assessment practice within PSKH.

5. The evaluation report says that PSKH are reaching priority students, both those who meet the policy’s definition of priority learners and those who are individually at greater risk of not achieving. PSKH note that while students bring a range of positive attributes to their education experience, large proportions have high, and sometimes complex needs. These included: low academic baselines and lack of core skills for learning; histories of disengagement from education; complex socio-economic and health needs that create barriers to education; and a lack of education role models to support and encourage education success. PSKH took a range of approaches to address these needs.

6. The PSKH mostly attribute student outcomes to a package of approaches, rather than to any single one. They report positive outcomes for students across a range of areas, which are not all captured in the regular reporting of contracted targets.

7. PSKH do not report barriers to the approaches they would like to take; although they may not have implemented some because they have prioritised these relative to resources and the demands of rapid establishment. The flexibilities enabled by the policy, and the special status of being a new type of school, are key enablers, but not without challenge.

8. Good assessment practice and information use are key components of quality teaching, playing a foundational role in raising achievement and improving student outcomes. Using the principles of effective assessment in the New Zealand Curriculum, and supplemented with recent literature, the report describes and assesses the quality of assessment practice in the PSKH.
9. The report describes assessment practice across the PSKH as 'good' overall, with confidence that all of the PSKH are either already delivering or are on a path to delivering assessment practice that is 'good' or 'very good' overall. All of the PSKH have very good understandings of assessment practice at leadership level and appropriate systems and tools in place to support it. Where PSKH practice was 'good' or 'very good', they are 'assessing for learning' and assessment practices are woven throughout the PSKH, classroom and individual student management. The team did not see examples of assessment practice that was overall 'poor' or 'inadequate'. Where PSKH face challenges, they were particular to their context, or were a reflection that they were somewhat earlier on in their journey to embed consistently good practice.

10. Assessment practice is an important contributor to good outcomes in the PSKH; in particular by supporting effective implementation of targeted support. Leaders in all of the PSKH have a good understanding of the relationship between assessment practice and student achievement outcomes. They see good assessment practice as a core to quality teaching and learning. While PSKH appear to have robust assessment practices in place, it is too soon to determine whether this has led to improvements in student achievement.
Recommendations

We recommend that you:

a. note the main findings from the Second Annual Interim Evaluation Report - Partnership Schools | Kura Hourua;

b. note that we propose to use a low-key communication approach for the report release;

c. approve the release of the report on the Education Counts website.

AGREE / DISAGREE

Dr Craig Jones
Deputy Secretary
Evidence, Data and Knowledge

Karl Le Quesne
Deputy Secretary (Acting)
Early Learning and Student Achievement

NOTED / APPROVED

Hon Nikki Kaye
Associate Minister of Education

Hon Hekia Parata
Minister of Education

16/03/17

NOTED

David Seymour
Parliamentary Under-Secretary
to the Minister of Education

13/07/2017
Education Report: Release of Second Annual Interim Evaluation Report - Partnership Schools | Kura Hourua

Purpose of report

1. This report:
   a. summarises the main findings from the Second Annual Interim Evaluation Report - Partnership Schools | Kura Hourua
   b. seeks your approval to release the report on the Education Counts website
   c. proposes a low-key communications approach for the report release.

Background

2. Partnership Schools | Kura Hourua (PSKH) are a new type of school in the New Zealand education system, focused on improving educational outcomes for those groups of students whom the system has not served well. This includes Māori, Pasifika, students with special education needs and students from low socio-economic backgrounds. The most significant difference between PSKH and state schools is that they have greater freedom and flexibility to innovate and engage with their students in return for stronger accountability for improving educational outcomes.

3. The Ministry of Education has contracted Martin Jenkins and Associates (MartinJenkins) to carry out a formative independent evaluation of the PSKH model.

4. Five PSKH opened in 2014, and a further four schools opened in 2015. The Whangaruru PSKH contributed to the scoping of the first phase of the evaluation, but it was not one of the three PSKH that MartinJenkins visited to examine innovation, and did not participate in phase 2.

5. This evaluation report is the second annual report from the evaluation, focusing on eight PSKH which opened in 2014 and 2015. The evaluation has three stages: early operation and implementation; creating the conditions for success; and achievement of intended outcomes. A final report is due in late 2017.

6. The evaluation is framed to answer four overarching evaluation questions over this time:
   a. What does the policy look like and to what extent is delivery aligned with design intent?
   b. To what extent are conditions for successful delivery of the policy in place?
   c. What outcomes were achieved and were they achieved through the mechanisms that were envisaged?
   d. What lessons can be drawn from the PSKH experience and what are the implications of these lessons for improving the design and delivery of the policy?
7. Both the evaluation and the implementation of the policy are in their early stages – this evaluation report provides feedback on the second year of operation of Round 1 PSKH and the first year of operation of Round 2 PSKH. The second stage of the evaluation focused on:

a. the approaches taken by the PSKH, to understand better what the policy is delivering in practice

b. an in-depth analysis of schools’ assessment practices and use of assessment data to inform decision-making in the classroom and across the school, as an important condition for success.

8. We provided a confidential copy of the draft report to the Evaluation Working Group, on which the Authorisation Board is represented, for their feedback.

9. The group met to discuss the draft of the evaluation report on 15 September 2016. Members of the Authorisation Board attending were Catherine Isaac and John Shewan. The agenda also included the focus and scope of the third and final phase of the evaluation.

How is the performance of PSKH being monitoring and evaluated?

10. The performance of individual PSKH is monitored by three agencies:

a. The Ministry assesses the quarterly and annual reports provided by the PSKH as part of their contract obligations, including information about whether the schools are meeting their agreed targets.

b. The Education Review Office (ERO) conducts a Readiness Review before the schools open, a New School Assurance Review (6 months after opening), and an Education Review (18 months after opening), with regular reviews thereafter, the same as state schools.

c. The Authorisation Board monitors the PSKH’s performance.

11. The Ministry also commissioned the external evaluation to look at how, and to what extent, the greater freedoms in the PSKH model have enabled the schools to develop different approaches, and what difference this has made to student outcomes.

12. Our Final Report on assessments for the 2015 year of operation has recently been submitted for consideration by the responsible Minister (METIS 1016278).

Measuring and reporting on student progress and achievement

13. Student achievement is at the heart of PSKH policy and, therefore, drives the reporting framework. As part of the performance management system, sponsors’ contracts require them to report on student achievement and student progress.

14. The Ministry and Authorisation Board are seeking a stronger emphasis and a more prescriptive requirement for schools to establish robust baseline data and to measure student achievement progress to ensure a consistent approach the way that data is to be recorded, reported and used.

15. \[s 9(2)(f)(iv) OIA\]
Evaluation scope

16. The evaluation focus is on how and to what extent the greater freedoms in the model have enabled the schools to develop different approaches. The evaluation will also look at what lessons can be learned from the schools' experience and the implications for improving the design and delivery of the model.

17. This focus means the evaluation is about how the model works in practice, not the performance of each PSKH or how that compares to state schools. The evaluation design and methodology fits the questions it aims to answer. The evaluation will:
   a. support decision-making about implementation and support for the schools, to help ensure implementation is efficient and effective
   b. describe how the PSKH operate in practice and look at the factors that contribute to successful outcomes
   c. provide an overview of how the model is developing on the ground over time and what outcomes it is achieving
   d. help grow knowledge about innovative schooling provision.

18. When the evaluation contract began, MartinJenkins and the Ministry established a working group to jointly oversee the smooth running of the evaluation. We augmented this group with members of the Authorisation Board in 2015. The group's main purpose is to provide a mechanism for the Ministry and MartinJenkins to direct and manage the evaluation contract with input and advice from the Authorisation Board.

Key findings

19. Year 2 of the evaluation used a mixed-methods approach, drawing on document review, interviews and an online survey to develop a comprehensive understanding of school-level provision. This was supplemented by quantitative analysis of outcomes data, which the Ministry provided to the MartinJenkins' evaluation team. The work in Year 2 had two parts.
   - Part 1 explored the approaches PSKH are taking to meet the needs of priority students at a broad level.
   - Part 2 explored in depth assessment practice within PSKH.

Part 1 - Broad approaches to meeting priority student's needs

Who are priority students, what are their needs, and what approaches are PSKH taking to these?

20. PSKH are reaching priority students, both those who meet the policy's definition and those who are individually at greater risk of not achieving. The report says that all of the PSKH have a good understanding of the needs of the students they seek to serve and intimate understanding of the needs of the individual students on their rolls. PSKH note that while students bring a range of positive attributes to their education experience,
large proportions have high, and sometimes complex, needs. The table below summarises these and the range of PSKH approaches to them.

<table>
<thead>
<tr>
<th>Areas of student need</th>
<th>Approaches used</th>
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<tbody>
<tr>
<td>Low academic baselines and lack of core skills for learning</td>
<td>Ensuring teaching and learning is of top quality&lt;br&gt;Ensuring early identification of students falling behind&lt;br&gt;Providing targeted support</td>
</tr>
<tr>
<td>Histories of disengagement from education</td>
<td>Clear attendance and behaviour expectations with consequences for breaches&lt;br&gt;Systematic and rapid follow-up when students are late/absent&lt;br&gt;Creating an environment that students want to be in</td>
</tr>
<tr>
<td>Complex socio-economic and health needs that create barriers to education</td>
<td>Reducing (or eliminating) the costs of education&lt;br&gt;Providing or brokering access to social and health services</td>
</tr>
<tr>
<td>Lack of education role models to support and encourage education success</td>
<td>Instilling high aspirations for every student and broadening student horizons&lt;br&gt;Involving parents/family/whānau in their student's education journey</td>
</tr>
</tbody>
</table>

**Why do PSKH choose these approaches?**

21. Sponsors are motivated to operate a PSKH because they believe they have something valuable to offer, with a deep belief in the value of their approach.

22. Sponsors' underlying worldview, developed from earlier experience, influenced both the initial design of their school and how they respond to emerging requirements. Building on this, PSKH also draw on leaders' experience, research evidence, emerging best practice, and ongoing evaluative and reflective practice to develop and refine their approaches. PSKH are very mindful of their contracted targets and the wide public interest in their success and quality.

**What outcomes are attributed to these approaches?**

23. PSKH mostly attribute the outcomes they achieve to the package of approaches they use, rather than to any single approach. They report positive outcomes for students across a range of areas, which are not all captured in the required reporting of contracted targets.

24. Other positive outcomes highlighted in the report expand on the required reporting (eg, achievement in subjects other than reading, writing and mathematics for primary age students) or include other important attributes, such as improved self-esteem and self-worth, development of high aspirations, adopting school values, and greater security of identity, culture and language.

**What has enabled or inhibited PSKH from taking their desired approaches?**

25. PSKH do not report any barriers to the approaches they would like to take, although they may not have implemented some because they have prioritised these relative to resources and the demands of rapid establishment.

26. The flexibilities enabled by the PSKH policy and the special status of being a new type of school are key enablers, but are not without challenge. Most PSKH perceived reporting requirements as burdensome, with some noting unresolved contract issues and/or a complex relationship with their key partner, the Ministry. In their view this has diverted attention and resources from delivery at times.
Part 2 - Assessment practice and information use

What is the value of good assessment practice and what does best practice look like in the PSKH?

27. Good assessment practice and information use are key components of quality teaching, playing a foundational role in raising achievement and improving student outcomes. Using the principles of effective assessment in the New Zealand Curriculum, supplemented with recent literature, the report describes and assesses the quality of assessment practice in the PSKH.

28. All of the PSKH report that assessments they administer are their primary source of information for developing a comprehensive baseline understanding of students' position in relation to National Standards, Nga Whanaketanga Rumaki Māori, or National Certificate of Educational Achievement (NCEA) expectations. They describe using a range of standardised and non-standardised existing assessments, while also either developing their own formal assessment tools or tailoring existing tools to meet students' needs. All say that staff at all levels have some responsibility for tracking and monitoring student progression, and that baseline assessment data is used to develop individualised learning plans for students. This includes class-based learning plans tailored to students' collective needs/capabilities (ie, by adapting curriculum, pedagogy and learning resources).

29. The PSKH also report that they draw on assessment data to inform school-wide and management/board-level decisions (eg, to target investment and resources). They use a range of age-appropriate approaches to involve students in assessment, with daily feedback and regular written reports being common. Efforts to engage parents/family/whānau in assessment go beyond reporting student progress: most PSKH try to improve parent/family/whānau understanding of how progress is measured and what expected performance looks like, and to enlist parent/family/whānau involvement to support students to achieve.

What is the quality of PSKH assessment practice and information use?

30. The evaluation team based its assessment of PSKH practice on in-depth interviews with academic leaders, document review, follow up from its previous evaluation visits (which included interviews and observations) and a confidential teacher survey asking respondents to rate their own ability, practice and confidence in a range of assessment areas and report on practices across the school overall.

31. The evaluation team describes assessment practice across the PSKH as 'good' overall, relative to the principles of effective assessment in the New Zealand Curriculum and recent literature. They are confident that all of the PSKH schools/kura are either already delivering or are on a path to delivering assessment practice that is 'good' or 'very good' overall. All of the PSKH have very good understandings of assessment practice at leadership level and appropriate systems and tools in place to support it. Where PSKH practice was ‘good’ or ‘very good’, they are ‘assessing for learning’ and assessment practices are woven throughout school, classroom and individual student management.

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1 In a standardised assessment, the content is set, the directions are prescribed and the scoring procedure is completely specified. Standardised assessment tools enable the result for any student to be compared with the results for a normal sample of students.
32. The team did not see examples of assessment practice that was overall 'poor' or 'inadequate'. Where PSKH did face assessment practice challenges, these were particular to their context, or reflected that they were at an earlier stage in their journey to embed consistently good practice. Examples of this included: balancing an equal and early focus on academic achievement alongside engagement, and linking assessment results to teaching; the need for ongoing professional development for staff; and access standardised tools relevant for the PSKH students.

**How is PSKH assessment practice related to student achievement outcomes?**

33. Assessment practice is an important contributor to good outcomes for PSKH; in particular by supporting effective implementation of targeted support. PSKH leaders have a good understanding of the relationship between assessment practice and student achievement outcomes. They see good assessment practice as a core to quality teaching and learning. Observed achievement outcomes for individual students or for groups of students are yet to reflect the quality of PSKH assessment practice. As this improves, it is likely to contribute to further improvements in student outcomes over time.

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**Risks and communications approach**

34. We propose to release the report on Education Counts.