

School planning and reporting in action: the early years of the new framework

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Executive summary

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Starting in 2003, the Planning and Reporting (PAR) framework has meant that all state and state-integrated schools are required to use data about their students' learning and school engagement in their school-wide planning, setting targets that can be used in annual reporting and review of the school programme and allocation of funds. This report describes what the PAR framework has meant for New Zealand's primary and secondary schools, and its initial impact on teacher practices and learning.

The report combines findings from two 2006 national surveys, both funded by New Zealand Council for Educational Research (NZCER's) purchase agreement with the Ministry of Education (MOE), with some comparisons with previous national survey data. These surveys are the:

- NZCER's Planning and Reporting surveys of a nationally representative sample of 186 primary school principals and 279 teachers from the same schools
- NZCER 2006 National Survey of Secondary Schools, which combines four separate surveys of: all state and state-integrated secondary school schools for the principal; a random sample of teachers; the board chairperson and one other trustee; and a random sample of parents from a cross-section of 27 schools. Planning and reporting was one of the themes included in these surveys, particularly for principals, trustees, and teachers.

Key findings

The good news is that, since 2003, there have been positive shifts in awareness of the intended outcomes for the planning and reporting process (PAR). As intended, the main focus is seen to be on raising student achievement within the school, and schools are all now setting goals with the learning needs of their students in mind.

Schools reported that most PAR goals addressed achievement in literacy and numeracy. These are the curriculum areas where both relevant professional development and a range of new assessment tools have been available to them, including tools that can be used both formatively to identify student learning needs, and to give a picture of overall student achievement levels, using national benchmarks. Seventy-three percent of the goals in literacy and/or numeracy given by principals were clear and measurable.

Some targeted other curriculum areas, or generic skills or competencies, but it seemed more difficult to write clear goals in these areas and then derive appropriate data to report on these. Secondary schools were more likely to say they had generic skills/competencies or ICT targets, and to target wider aspects of schooling—e.g. attendance, behaviour, and school climate.

Once goals have been determined a wide range of tools is being used to gather summative assessment data to report on overall achievement in target areas. Recently developed assessments with national benchmarks feature prominently, such as the numeracy diagnostic interview, STAR tests, and national exemplars. Around two-thirds of primary schools are using either asTTle tools or PAT tests, or both. Two-thirds of secondary schools use NCEA data for reporting purposes. In primary schools a very wide range of tools is being used for formative learning purposes: portfolios, exemplars, ARBs, self and peer assessment are all being used formatively, as are teacher observations and teacher-designed tasks. Most primary teachers are confident about their ability to interpret achievement data and there has been a marked increase in self-reported confidence since the 1999 NZCER National Survey, particularly in literacy and numeracy, with the latter particularly evident in low-decile schools. However, about a third of secondary school teachers say they need help with data analysis.

Is all this activity making a difference for students' learning? We can say that PAR is providing a focus for ongoing teacher conversations and professional learning. Moderation conversations are now common and represent a profound change of culture in primary schools. They are less of a shift in secondary schools, because moderation is integral to NCEA implementation. Once schools have determined their goals, the most common initial response is to access appropriate professional development, and, in conjunction with this, to develop action plans to address goals.

Planning and reporting activities are widely seen to have made at least some impact on various aspects of school life and classroom activity, with many teachers and principals reporting positive impacts. Primary principals tend to be more positive about outcomes than their secondary counterparts. There is some evidence that low-decile primary schools are paying more attention to assessment than they were previously (deciles 1–2) suggesting that investment in professional development in these schools is bearing fruit.

A quarter of the primary schools have processes in place for discussing PAR results with parents. Students' most common form of involvement is via individual goal setting, and self or peer assessment for formative assessment purposes. Since 2003, secondary teachers have made modest gains in the use of these strategies.

Where targets have not been met, there is little evidence of schools taking the easy way out by lowering targets. Targets are likely to be revisited and the action plan adjusted, as intended within the framework structure. Potential obstacles are the time taken by the process and expectations on teachers to complete too many assessments. These are likely to be seen as either minor or moderate issues, with few respondents seeing them as major issues. Some primary schools see an inadequate Student Management System (SMS) as an obstacle to using planning and reporting data to improve classroom teaching. Congruent with this, about a third of primary schools have yet to begin using a SMS to manage data.

Actions likely to support the continuing bedding in of the PAR framework include ongoing support for setting clear and measurable reporting goals (in about a third of primary schools this is not yet happening). The development of appropriate assessment tools in areas other than literacy and numeracy, and particularly in relation to important aspects of skills/key competencies, will be an interesting challenge, but this will need to happen if the scope of PAR activities is to be widened. Another area of ongoing need for support is in continuing or extending the availability of professional development related to making data-supported teaching decisions—in data interpretation (both generally and in relation to the features of specific widely used tools), and in deciding what data trends mean in terms of likely “next learning steps” in specific curriculum/learning areas. Preferably schools will be supported to use assessment strategies that integrate both formative and summative purposes so that assessment is seen as integral to, not separate from, learning.