

The work of school boards— trustees' perspectives

Findings from the NZCER national survey of primary
and intermediate schools 2016

Eliza Stevens and Cathy Wylie

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Key findings

Providing strategic direction, followed by supporting principal and staff and representing parents and whānau continue to be the main key elements of the role of boards of trustees that trustees identify. Few see their role as an agent of government or representing government interest. Good financial monitoring and staying in budget, maintaining high-quality teaching, improving governance processes, improvements in student progress and achievement are identified by around half of the trustees as their board's main achievements in 2015–16. Adequate funding of schools along with staffing levels or class sizes, and property maintenance or development are the three main issues identified as facing their schools.

Student progress and achievement tops the list of the main activities that boards spend their time on, followed by property and its maintenance, policy review, and financial management.

Trustees are mainly motivated to go onto their school board by wanting to contribute to their community, followed by wanting to help their children, and provide useful skills. Just under half were asked to put themselves forward. Most of those serving on the boards of primary and intermediate schools are new to the trustee role, but many come with governance experience in other organisations, though the proportions have decreased slightly since 2010.

Nearly three-quarters of trustees, but less than a third of board chairs, spend 2 hours or less per week on board work. For board chairs the workload appears to have increased since 2013, with 18% reporting that they spend 6 hours or more per week on board work, compared with 13% in 2013. Most trustees felt that the level of responsibility asked of boards is 'about right', but principals were less positive, with 40% indicating that boards were being asked to take on too much responsibility.

Most boards continue to communicate with their school communities at similar levels to previous years, with an increased use of online methods.

Overall, trustees reported being well supported through professional development workshops and resources, particularly from NZSTA. Fewer principals than in previous years reported that their boards required a lot of support from them or that the board acted mainly as the principal's sounding board.

The 2016 survey data show that most aspects of trustees' work and their perspective of their board's role have remained much the same over the past decade.

1. Introduction

Effective governance is described by the Education Review Office (ERO)¹ as one of five dimensions that impact on student learning and achievement, and it is the trustees on school boards who carry the responsibility for the governance of their school. ERO describes the key elements of effective governance as:

- provision of vision and strategic direction and planning
- focus on student achievement
- ensuring effective allocation of resources
- stewardship through effective relationships
- critical self-review.

In the NZCER national survey of primary and intermediate schools 2016, the questionnaire for trustees included questions about each of these aspects. In the NZCER national surveys we send two questionnaires via the school to the board chair. We ask the chair to give one questionnaire to another board member other than the principal or teacher representative, preferably one who might have a different view on some issues. Sixty-one percent of those who responded in August and September 2016 were board chairs, up from 48% in 2013. On the whole, chairs and other trustees who responded to the survey gave similar responses. Any marked differences in the views of chairs and other trustees are noted. Principals' and parents' views of the key elements in the role of boards, parents' and whānau views of their involvement in consultation and contact with their school board, and principals' views of how their school board is working, are also included in this report.

The NZCER national survey of primary and intermediate schools 2016

NZCER has run national surveys since 1989 to show what is happening in schools at the time and this report looks at any trends since 2010. This year's survey was conducted from August to early September 2016 and was sent to a representative sample of 349 English-medium state and state-integrated primary and intermediate schools (20% of all these schools in New Zealand).² At these schools, surveys were sent to the principal and to a random sample of one in two teachers and trustees as described above. Additionally, surveys were sent to a random sample of one in four parents at a cross-section of 36 schools. The response rates were 25% for trustees ($n = 176$), 57% for principals ($n = 200$), 38% for teachers ($n = 771$), and 32% for parents and whānau ($n = 504$).

1 <http://www.ero.govt.nz/publications/nga-whakangungu-kawanatanga-ma-nga-poari-whakahaere-me-nga-whanau-i-roto-i-nga-kura-governance-training-for-boards-of-trustees-and-whanau-in-kura/introduction/#footnote4>

2 Further details about the sample, response rates, school and respondents' characteristics are available in a separate report: Berg, M. (2017). *NZCER national survey of primary and intermediate schools 2016: Methodology and sample information*. Wellington: NZCER. Available at: http://www.nzcer.org.nz/system/files/Technical%20Details_Report.pdf

The survey returns for principals, teachers, and trustees were generally representative of schools in the sample, with the following small variations for trustees and principals:

- The schools from which we received trustee surveys reflected some over-representation of large schools and under-representation of decile 1 schools.
- Principal returns showed a slight over-representation of large schools, and metropolitan schools. Decile 8–10 schools were somewhat over-represented, as were schools in the Auckland region.

The maximum margin of error³ for the trustee survey is around 7.4% and for the principal survey is 6.9%. Sometimes we report results for smaller groups of respondents within each survey; the maximum margin of error reported for each survey does not apply to these groups. Calculating the margin of error relies on random sampling and because we rely on trustees to complete surveys, we cannot guarantee that these samples are random. Therefore, the margins of error for the trustee survey should be regarded as approximations. The parent and whānau sample is not a random sample; therefore, we do not calculate a margin of error for that survey.

This report focuses on trustees and their work in 2016. It notes any marked differences related to the school characteristics of socioeconomic decile and school size and changes since 2010. We also comment on how trustees' views relate to the views of principals or parents, where appropriate.

3 The maximum margin of error added to and subtracted from a proportion gives a confidence interval. We can say there is a 95% chance that the proportion is inside this range of numbers.

2.

Trustees' experience and paths to the trustee role

Experience of governance

Most of the trustees who responded to the survey had not been on a school board before (81%, which was similar to the proportion in 2013 (86%), and more than in 2010 (74%)). Of the 19% who had served on a school board before, most had been on a primary school board. Only a few had been on an intermediate or secondary school board, which is unsurprising as trustees are likely to be on the boards of the schools attended by their children as they progress through school levels.

School boards were the first governance experience for 56% of the trustees. The remaining 44% indicated that they had served on the boards of another type of organisation with some having served on more than one other board. This is slightly fewer than in 2013 (when 48% of trustees said they had some other experience of a governance role) and in 2010 (52%). In 2016, 17% of trustees responding had served on the board of a non-government/voluntary organisation with staff, and 15% on the board of a non-government/voluntary organisation that did not employ staff, 17% on the board of a business, and 11% on the board of some other organisation.

Trustees' median length of time served on their board was 3 years, 2 months; the same as in 2013 and 2010. Sixty-one percent of respondents were chair of their board, and they had generally been on their board longer: a median of 3 years, 3 months, compared with 1 year, 10 months for other trustees. The median length of time served by board chairs in 2013 was 3 years, 8 months. Thirty-six percent of trustees responding to the survey indicated that they would stand again in the next board election in 2019, 26% said they wouldn't, and 38% weren't sure.

We asked principals how many trustees were new to their school board since the May 2016 board elections to see what continuity there would be in board knowledge. In 2016, 42% of principals surveyed reported that about half of the trustees were new since the May election, 28% said most of the trustees had remained the same, and 22% said most of the trustees were new. Only 3% said that all trustees were new, and 3% said that they were all the same. As in 2013, this suggests that continuity is not an issue for most boards. However, there was a small increase in the proportion for those where it might be an issue to 25%, compared with 20% in 2013.

Social characteristics of trustees responding to survey

Just over half of the trustees responding were aged 40 to 49 years (56%). Twenty-four percent were aged less than 40, and 20% were 50 or above.

The trustees who responded to the survey included an almost even number of men (49%) and women (51%), and more board chairs than in previous surveys were women (52%, compared with 43% in both 2013 and 2010).

Trustees were asked to select which ethnicities they identified with. The majority (84%) identified themselves as New Zealand European (up from 78% in 2013 and over the national proportion of 74%⁴ who identify as NZE/Pākehā); 13% identified themselves as Māori (slightly under the national proportion of 15%); 2% each identified themselves as Cook Island Māori and Chinese; 1% each identified as Niuean, Samoan, and Indian; and 6% identified as 'other' ethnicity. Of the trustees who identified as Māori, almost half were on the boards of decile 1–2 schools.

Over half of the trustees who responded to the survey in 2016 had a university-level degree (56%), up from 50% in 2013. This is a similar proportion to trustees in secondary schools, and much more than the national proportion of adults who have a tertiary degree (20% according to the 2013 census⁵). Only 6% of trustees who responded to the survey had no qualification, including 17% of those in decile 1–2 schools. Similar proportions of trustees across decile groups had a Bachelor's degree or Graduate Diploma. More trustees with Masters or PhD-level qualifications were on the boards of decile 7–10 schools, compared with decile 1–6 schools.

Sixty percent of trustees were in paid employment, 30% were self-employed, and 9% were not in paid employment. A quarter of the trustees in decile 1–2 schools were not in paid employment.

Reasons for taking on the trustee role

Contributing to their community, followed by wanting to help their children, were the most commonly reported reasons people stood for their school board. Just under half said they had skills they felt would be useful and a similar proportion said they were asked to stand. Few went onto the board to change things at the school or because they felt leadership was lacking. Table 1 shows that these drivers or attractions of school board membership have been quite stable over time. These drivers are also very similar to those at secondary level,⁶ though more trustees from secondary schools said that they wanted to improve achievement levels.

4 <http://www.stats.govt.nz/Census/2013-census/profile-and-summary-reports/quickstats-about-national-highlights/cultural-diversity.aspx>

5 <http://www.stats.govt.nz/Census/2013-census/profile-and-summary-reports/qstats-education-training/highest-qualification.aspx>

6 See Wylie, C., & Bonne, L. (2016). *Secondary schools in 2015*. Wellington: NZCER Press. Available at: <http://www.nzcer.org.nz/research/publications/secondary-schools-2015>

TABLE 1 Trustees' reasons for joining their primary school board

Reason	2010	2013	2016
	(n = 252) %	(n = 277) %	(n = 176) %
To contribute to the community	86	82	80
To help my child/children	66	66	59
I have particular skills that are useful	*	54	48
I was asked	50	44	43
I wanted to learn how the school operated	*	47	38
I wanted to improve achievement levels	18	25	18
I wanted to change things at the school	14	11	14
Not many people were standing	*	9	12
Leadership at the school was lacking	9	4	9
Represent Pasifika	*	*	5
Represent Māori	*	*	3

* Not asked in that year

There was an association between school socioeconomic decile and the trustees who selected improving achievement as one of the reasons for joining their school board. The proportion of trustees who reported this as a main reason for standing for the board ranged from 38% of trustees on the boards of decile 1–2 schools to 7% of trustees on the boards of decile 9–10 schools. Six of the seven trustees who identified with a Pacific Island ethnicity said they wanted to represent a Pasifika perspective. Of the 23 who identified themselves as Māori, two said they were motivated to stand for the board to represent a Māori perspective.

3.

The work of boards

Key elements of the board of trustees' role

Providing strategic direction continues to be seen by trustees, principals, and parents as the key element of the role of school boards. Table 2 also shows that each group then sees that boards need to represent parents and whānau as they also support the school staff. Scrutiny of school performance follows next. The orientation remains towards the school and its community, with few seeing representing the government interest in the school as a key element of board work.

It is interesting to note that trustees' views of the key elements of their role seem to align with the ERO key elements of effective governance (listed in the Introduction). Providing strategic direction is foremost in both cases; focus on student achievement is reflected in the scrutiny of school performance; supporting staff and representing parents and whānau aligns with stewardship through effective relationships; and effective resource allocation aligns with trustees recognising oversight of finances as an important part of their role.

TABLE 2 Views on the key elements of the board of trustees' role

Key elements of board role	Parents and whānau (n = 504) %	Trustees (n = 176) %	Principals (n = 200) %
Provide strategic direction for school	79	81	92
Support school staff/principal	57	43	77
Represent parents and whānau in the school	62	39	71
Scrutinise school performance	33	26	55
Oversee school finances	47	25	59
Oversee principal's performance	35	21	61
Employ school principal	23	17	55
Agent of government/representing government interest	12	3	13

A few trustees made an additional comment here, mainly focusing on student achievement and school quality:

Fostering student achievement, best educational outcomes for each child, successful and safe, a learning culture in NZ.

[making] school the best it can be.

Main activities of boards

Trustees were asked to rank aspects of board work in order of the amount of time spent on them. The time boards spent on activities also relates to the key aspects of effective governance identified by ERO (see *Introduction*), with Figure 1 showing the most time being spent on student achievement and progress, followed by oversight of resources (finance and property), review (including policies), and strategic direction (indicated by time spent on the charter).

Less board time was reported to be spent on aspects of human resources management, and issues related to student behaviour, the community, or board professional development. Given that the balance between governance and management is sometimes described as a tension, the overall picture suggests that boards overall seem to be working mostly, but not always, at the level of governance.

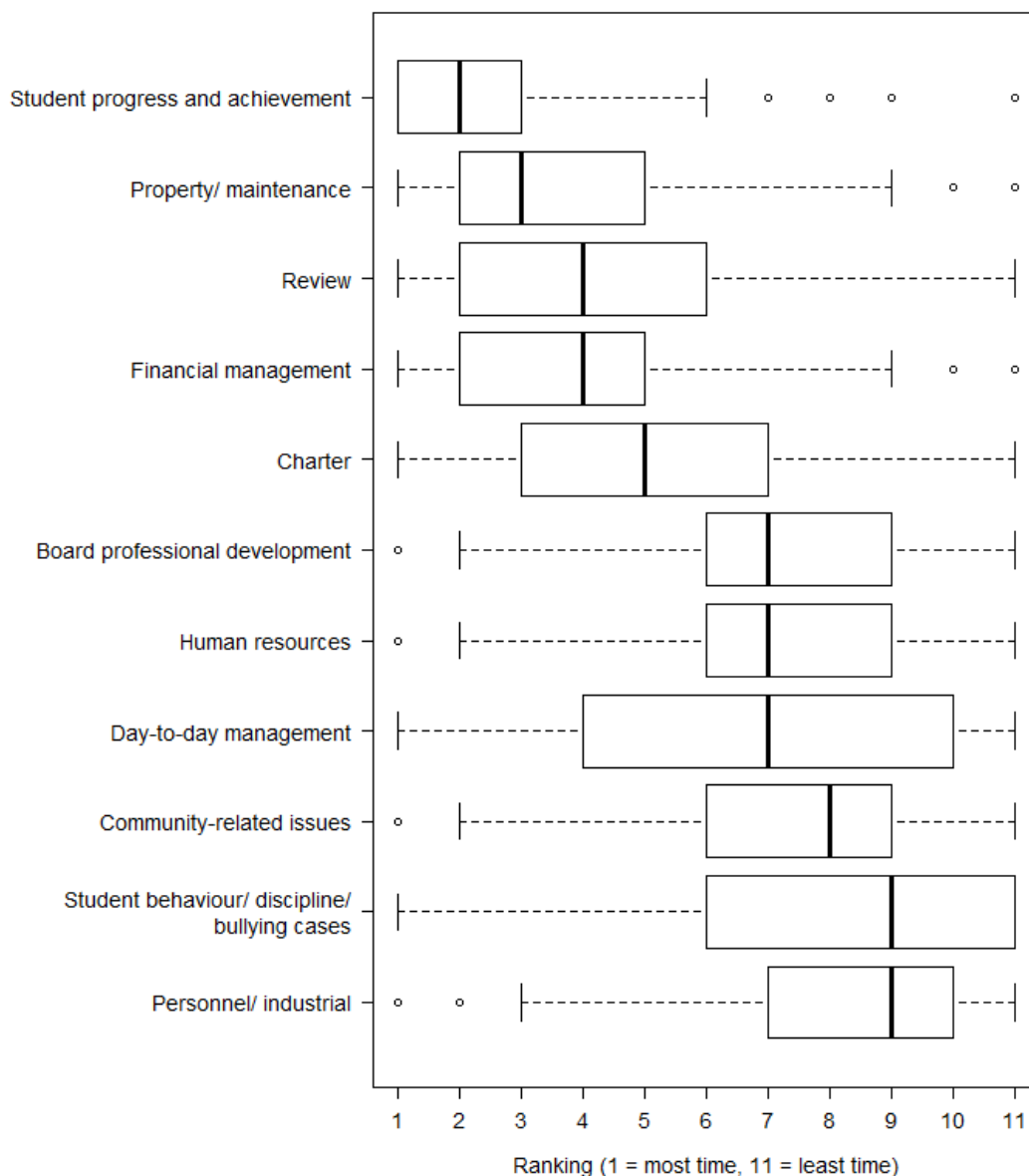
Figure 1 also shows that there is a wide range between boards in how much time they gave to particular aspects of their role (or, in the case of day-to-day management, what they should not be doing as the school's governing body). All aspects we asked about have at least one trustee saying that that was what their board spent most of its time on over the past year. Figure 1 also shows that student progress and achievement is the aspect that shows the least variation.

Trustees indicated a greater proportion of time than in 2013 spent on review and board professional development relative to other aspects of their work. This suggests an increased focus on self-reflection and review, and on improving board capability.

When asked directly if their boards reviewed their own processes 34% said their board regularly

reviewed its own performance, up from 29% in 2013.⁷ Forty-eight percent of trustees said their board did so sometimes, up from 40% in 2013. Slightly fewer trustees reported that their board did not review its processes in 2016 (6%), compared with 11% in 2013 and 9% in 2010.

FIGURE 1 Main activities of boards in terms of time as ranked by trustees (n = 176)⁸

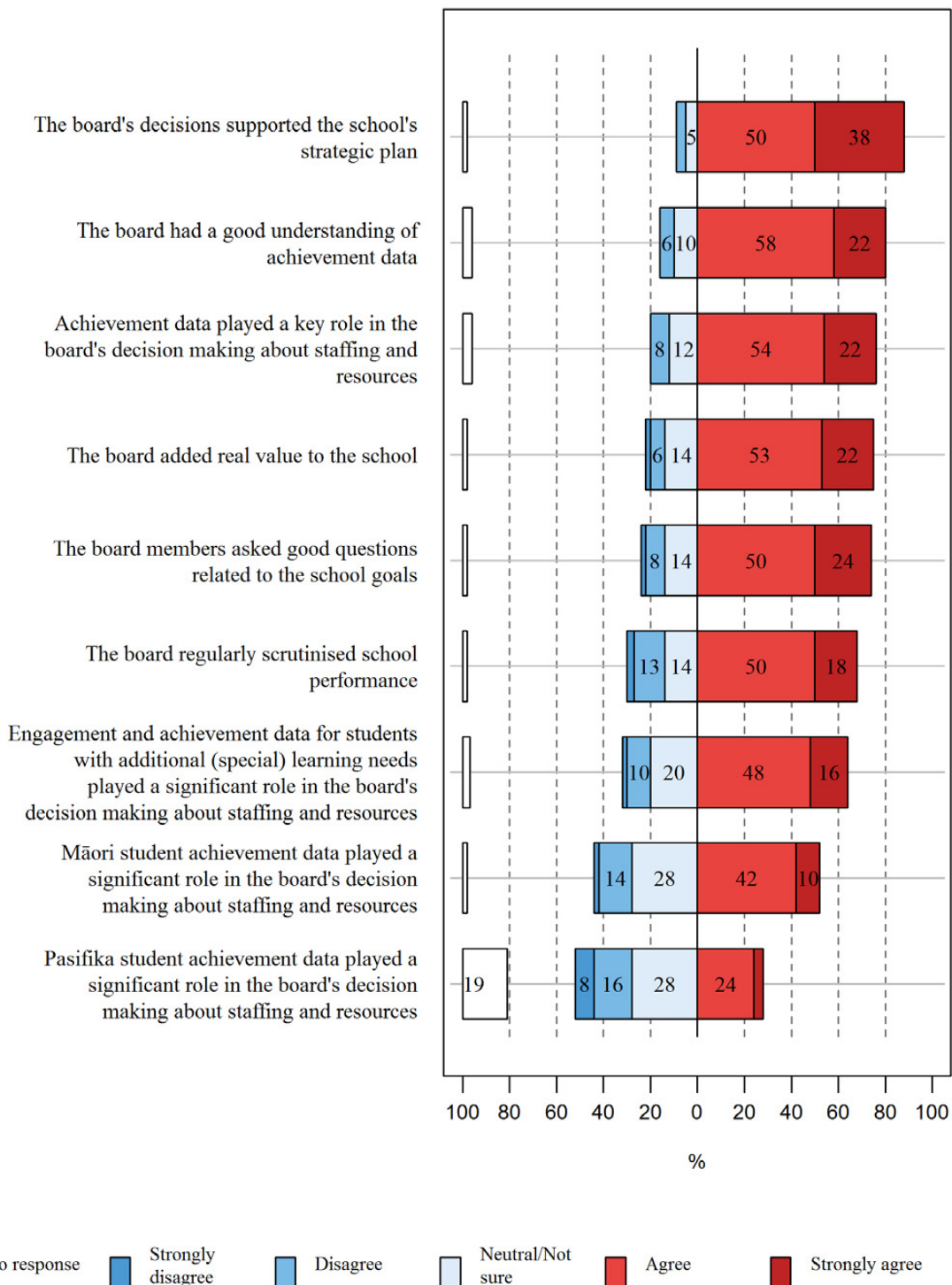


7 Small percentage increases may fall within the margin of error described at the beginning of this report, but are reported when supported by other responses.

8 Presented here in the order of the median ranking given. The figure is a 'box and whisker' graph, with the line in the middle of the box showing the median ranking, and the left hand side of the box indicating the spread of the 25% of scores above the median, and the right hand side of the box indicating the spread of 25% of scores below the median, with the single bars indicating the full range, and dots as outliers.

We also asked principals, as the school’s professional leader employed by the board, about how their previous board worked.⁹ Figure 2 shows that most primary and intermediate principals saw their boards actively paying attention to achievement data in both their scrutiny of school performance and decision making about resource allocation.

FIGURE 2 Principals’ views of their previous board’s scrutiny and decision making (n = 200)



9 Principals were asked about the board they had worked with before the June 2016 board of trustees election.

When compared with 2013 survey results, principals’ responses showed a small increase in the perceived level of board engagement with data for decision making about Māori and Pasifika students, and students with additional (special) learning needs. This was more at the ‘agree’ than ‘strongly agree’ level.

Hours per week

Most of trustees’ work occurs in relation to meetings, which are often monthly. Almost half (47%) spent less than 2 hours a week on their board work. This is similar to 2013 (54%) and 2010 (48%). Board chairs, who represented a larger proportion of the trustee responses in 2016 (61%), and who tend to work more closely with principals, spent more time on board work than other trustees. Less than a third of chairs (31%) carried out their role in less than 2 hours per week, compared with 73% of other trustees. This is about the same as in previous years. The proportion of chairs who spent between 2 and 5 hours on board work has decreased over the years from 57% in 2010 to 50% in 2016. In the same period the proportion of board chairs who spent between 6 and 10 hours on their role has increased from 10% to 14%, and those who spent more than 10 hours a week has increased from 2% to 4%. Overall, 18% of board chairs spent more than 6 hours a week in their role in 2016, up from 12% in 2010, suggesting an increase in workload for some boards.

Amount of responsibility asked of school trustees

Most trustees felt that the amount of responsibility asked of boards is ‘about right’. Eighteen percent thought it was too much. Few thought it was too little. More board chairs than trustees thought the amount of responsibility asked of boards was too much; 21%, compared with 10%.

More principals (40%) than trustees think that trustees are asked to take on too much responsibility. However, Table 3 shows that an increasing proportion of principals over the past 10 years think the levels of responsibility are about right.

TABLE 3 **Principal and trustee views that the amount of responsibility asked of trustees is about right**

About right	2007 %	2010 %	2013 %	2016 %
Trustees	67	68	77	75
Principals	41	45	54	58

Thirty-three percent of the trustees who responded to the survey also made some comment on their or their board’s responsibilities. A third of these noted that it is a demanding role for volunteers; one which requires new trustees to develop expertise in a range of areas such as legislative requirements. Twenty percent of those who commented expressed some concern at the level of board or personal responsibility. Twelve percent commented on the importance of having a knowledgeable principal and a range of expertise on the board. Some comments highlighted that board chairs especially have to come to terms with a range of processes and issues related to education. A few board chairs commented that their role was more time consuming than they had expected.

A sample of the comments shows the range of views about board responsibility:

Being a board chair comes with huge responsibility and situations can emerge very quickly and take a huge amount of time. The impact on my family and employer has been significant and goes unrecognised.

[the level of responsibility] was initially a surprise. Up until being appointed, I assumed the principal had more responsibility.

It is 'about right' only if the trustees are capable and understand their role and commitment. I can see that in some areas/schools this responsibility would be too much. It takes 'the right people' to make this model work.

Very aware that the board is responsible for the children's learning—a very important responsibility.

Sometimes the situation demands too much of relatively untrained and unpaid people who volunteer (e.g., employment of a principal—very time consuming).

[It's] hard to know what the full implications of bad choices are to individual board members.

Responsibility seems to be more encompassing of social/behavioural issues.

Legislative responsibility is an enormous load—when we are talking about young minds/learning.

However, as parents that is the role we sign up for anyway. So as a collective of parents and community trusteeship/guardianship makes perfect sense.

Overall, trustees saw their boards focusing on strategic direction, student achievement, and resource management. Most felt the level of their responsibility for the school was about right, though the demands are higher for chairs. Time spent on key aspects of board responsibilities does vary between schools, indicating differences in context and capability.

4.

Support for the trustee role

Trustees were asked about the professional development they had participated in, and the support, advice, and information sources they had used in the past year. The New Zealand School Trustees Association (NZSTA) is contracted by the Ministry of Education to provide a range of professional development, support, and advisory services to boards of trustees. All state and state-integrated school boards can access basic NZSTA services, resources, and information. School boards can also choose to become member schools through an annual subscription, which offers additional benefits such as national and regional newsletters and meetings, annual conference, additional web resources, study awards, advocacy, and discounts on insurances and copyright licensing. In 2017, 92% of state and state-integrated school boards are members of NZSTA.

Professional development

Most trustees (81%) reported that they had some form of professional development for their role in the past 12 months. Almost all of this was available to them through NZSTA, or their paid work. Only 7% had participated in individual professional development paid for by their school. Sixteen percent had no professional development in 2016, very similar to 2013 and 2010.

Table 4 shows the professional development that trustees reported taking part in. The most frequently reported form of professional development was the NZSTA workshop on Governance essentials.

TABLE 4 Trustees' participation in NZSTA-provided workshops and other professional development

Workshop or professional development	2016 (n = 149) %
Governance essentials (NZSTA workshop)	46
Professional development in my paid work which helps me in my governance role	27
Vulnerable Children's Act—Health and Safety (NZSTA workshop)	22
Online modules (NZSTA workshop)	15
Attended NZSTA conference	15
Hautū—Māori cultural responsiveness self-review tool (NZSTA workshop)	14
Policy framework (NZSTA workshop)	11
Finance (NZSTA workshop)	9
NZSTA provider worked with school	9
Employer role (NZSTA workshop)	8
Leadership (NZSTA workshop)	7
Individual course/mentoring/coaching paid for by school	7
Principal performance management (NZSTA workshop)	6
Nothing (no professional development)	16

Board chairs were more likely than other trustees to have attended NZSTA workshops on principal performance management and the employer role. They were also more likely to report doing online modules through NZSTA, attending the NZSTA conference, and working with an NZSTA provider at the school.

Higher proportions of trustees of decile 1–2 school boards reported participation in NZSTA workshops on the Vulnerable Children's Act, Hautū, policy framework, and finance, and the annual NZSTA conference

Advice

Trustees were asked to indicate what advice they had received for their role over the past 12 months. Table 5 shows the more structured or formal advice reported by trustees in 2016. NZSTA, followed by ERO and the Ministry of Education are prime sources of advice. Fourteen percent of trustees came from schools that were also contracting and paying for their own adviser to work with their whole board.

TABLE 5 Advice for trustee role in previous 12 months

Source	2016 (n = 176) %
NZSTA helpdesk (Advice and Support Centre)	31
NZSTA HR adviser	25
ERO	24
Regional Ministry of Education office	17
NZSTA Industrial Relations adviser	17
Whole board worked with contracted adviser paid for by school	14

Impact of professional development and advice

Most trustees felt that professional development or advice had had some positive impact; most often that it had given them a better understanding of their role. Table 6 shows that this work with experts beyond their own school was important for many trustees in terms of understanding their responsibilities; and for a minority, in terms of important decisions they needed to make. The types of impact selected by trustees were much the same as in 2013. The proportion of trustees who said that professional development and support had little or no impact remains the same as in 2013 (6%).

TABLE 6 Impact for trustees of professional development and advice

Impact	2016 (n = 176) %
Gave me a better understanding of my role as a trustee	59
Ensured that our board processes were compliant with the law	36
Affirmed what we were already doing	33
Gave me a better understanding of the board's role as employer	32
Gave me a better understanding of how to review school progress	28
Helped us resolve a difficult situation	27
Helped us improve our strategic planning	26
Gave me a better understanding of the achievement information we get from the school staff	23
Helped us improve our annual planning and reporting	21
Gave me a better understanding of financial information we get from the school staff	17
Helped us make some hard decisions/avoid some costly mistakes	17
Helped us appoint a new principal	12
Helped us with our consultation processes	7
No impact/not much changed	6

Other guidance and support

Trustees were also supported within their schools by guidance and information from school staff and/or the school principal (76%, compared with 59% in 2013). About the same proportion as in 2013 (44%) had used their board induction pack to learn about the school and the way the board works. Just under a quarter (23%) said they had obtained advice or support through discussions with ERO during the school's review; this is about the same proportion as in 2013. Since ERO reviews around a third of schools each year, this suggests that most trustees whose school was reviewed found their interaction with ERO reviewers helpful.

Support from employment

Of the trustees who responded to the survey, 60% were in paid employment, 29% were self-employed, and 9% were not in paid employment. Overall, 76% of the trustees who were employed said they had some support through their paid employment to do board work, which is very similar to the results in 2013 and 2010.

Twenty-seven percent of trustees who responded to the survey said that professional development in their work had helped them in their governance role. Those in paid employment were more likely than self-employed trustees to indicate this; 33% compared with 24%.

Around 70% of the self-employed trustees said they were able to use some work time to support their role as a trustee, with just over half who could use some work time needing to make up the work time. Fifty-nine percent of self-employed trustees were able to use some work equipment, such as a work computer, to support their board work.

Trustees in paid employment seemed to have slightly less flexibility. Nevertheless, 55% said they could use some work time to support their role as a trustee, with about half of these (25% of all trustees in paid employment) indicating that they would need to make up the time. Thirty percent of trustees in paid employment said they were able to use some work equipment, such as a work computer, for their board work.

Sources of information

Almost all trustees (93%) said they had ready access to information at the school to help them in their role as a trustee. Of those who indicated they had access to information, the principal was a key source for most (83%), regularly sharing new information and government reports. Sixty-two percent said that they had access to a board policy framework. Over half said the school provided the board with useful background material for key decision making (58%), while similar proportions indicated that they could access information online (58%) or use a board induction folder (56%). Just under half (45%) reported access to archived material. Sixteen percent said they had access to a library of relevant material. The latter two responses were more likely to come from trustees in rural schools.

Trustees' use of written and digital resources

Trustees also drew on a range of material published for boards by NZSTA, the Ministry of Education (MOE), and ERO. National reports produced by the Ministry of Education and ERO were also useful sources of information and understanding for some. Table 7 shows that the most used written resources were those that come from NZSTA.

TABLE 7 Trustees' use of written and digital resources in past 12 months

2016 % range	Resource	Provider
53%–54%	STANews	NZSTA
	Trusteeship—a guide for school trustees	NZSTA
35%–40%	Effective governance—how boards work	MOE
	Effective governance—working in partnership	MOE
	NZSTA trustee handbook—‘the black book’	NZSTA
	STA memos via email	NZSTA
15%–20%	Hautū—Māori cultural responsiveness self-review tool	NZSTA
	ERO indicators	ERO
	ERO national reports	ERO
	Internet material from New Zealand Qualifications Authority (NZQA)	NZQA
10%–14%	School trustees—helping you ask the right questions	ERO
	Effective governance—supporting education success as Māori	MOE
	Effective governance—building inclusive schools	MOE
	NZSTA guidelines for principal appointment	NZSTA
	Wellbeing guidelines	ERO
<10%	Bullying prevention and response: A guide for schools	MOE
	Material on good governance in other sectors	Other
	Effective governance—recruiting and managing staff	MOE
	Guidelines to assist boards of trustees to meet their good employer obligations to Māori	PPTA* and NZSTA
	Effective governance—supporting Pasifika success	MOE
	NZ Schools—Minister of Education’s annual report to Parliament	MOE

* Post Primary Teachers’ Association

Board chairs were more likely than other trustees to use the ERO national reports and indicators. Chairs were also more likely to use the resource *Effective governance; Working in partnership* (MOE) (42%) and *School trustees booklet; helping you ask the right questions* (ERO) (26%). This aligns with their leadership responsibilities for the board.

As one might expect, trustees who said they used the resource *Effective governance: Supporting Pasifika success* were more likely to be on the board of decile 1 and 2 schools, as these tend to be the schools with the highest numbers of Pasifika students on their rolls. Trustees who said they had used the Ministry of Education’s bullying prevention and response guide were also more likely to come from decile 1 and 2 schools.

5. Interactions with the school community

Boards have a legal requirement to regularly consult with their school community. Most of the trustees (86%) said their board had consulted with their community in the past 12 months. This is a similar proportion to previous years (82% in 2013; 87% in 2010).

Written questionnaires continue to be the most common way boards consult their community, followed by public meetings or workshops at the school (see Table 8). Use of email surveys has increased since 2010.

Trustees from decile 1–2 schools were least likely to report emailing surveys to parents and whānau (3%, compared with 50% of trustees in decile 9–10 schools), or holding public meetings or workshops at the school, but somewhat more likely than trustees from higher decile schools to report consulting in other ways such as hui with iwi/hapū, hui with whānau, or questions in the school newsletter.

TABLE 8 Board interaction and consultation with community, reported by trustees

Methods used to consult	2010 (<i>n</i> * = 208) %	2013 (<i>n</i> * = 226) %	2016 (<i>n</i> * = 152) %
Written questionnaire(s) to parents and whānau	59	73	63
Public meetings/workshops at school	42	50	52
Questions in school newsletter	50	43	40
Parents and whānau invited to board meetings/workshops	32	31	38
Email survey of parents and whānau	6	25	32
Hui with whānau	15	26	18
Hui with iwi/hapū	*	*	12
Public meetings/workshops in community	11	11	11
Specific groups met with board members	12	10	7
Phone survey(s) of parents and whānau	5	8	6
Home meetings	3	4	2

* *n* = number of trustees who answered yes to the question “Does your board consult with its community?”

Trustees on boards that consulted their community indicated a wide range of topics covered (see Table 9). Less than a quarter of the trustees who said their boards consulted their communities included current government focus areas such as provision for Māori students (20%), and incorporating te reo and tikanga (15%). Fewer (<10%) reported that their board had consulted with the community about provision for Pasifika students, English for speakers of other languages, or students with additional (special) learning needs, though it is possible that boards communicate more directly with such specific groups when appropriate. Decile 1–2 school trustees were most likely to report consultation on student attendance (24%).

TABLE 9 School community consultation topics, reported by trustees (*n* = 152)

2016 % range	Topic
32%–38%	Student achievement Curriculum/subject options Reporting to whānau
20%–27%	Student health and wellbeing School charter Ways of working with parents, whānau, and community School culture Use of digital technology Provision for Māori students Modern learning environment
15%–17%	Becoming part of a CoL (Community of Learning) School uniform School trips Property Safety of students Incorporating te reo and tikanga Progress on annual plan target/goals
10%–14%	Student behaviour Sports Co-curricular activities

5%–9%

Funding
 Provision for Pasifika students
 Student attendance
 Enrolment scheme/zoning
 Sex education
 Local iwi education priorities
 Provision for students with English as a second language
 Timetabling/start and finish times
 Provision for students with additional (special) learning needs

Involvement in school consultation

Thirty-one percent of the trustees estimated that up to quarter of their school’s parents and whānau participated in board consultation. Nineteen percent estimated that between a quarter and half of all parents participated; 11% thought that between half and three-quarters participated; and 11% thought that over three-quarters of parents participated. Nearly a quarter said they did not know what percentage of parents had participated in their board’s consultation.

Most (76%) of the trustees whose boards had consulted with their parents and whānau thought that the methods used were successful: 42% generally successful, and 34% for some issues. This is a similar picture to previous surveys.

Parent and whānau perspectives

Just over half of those responding to the parent and whānau survey thought their school genuinely consulted them about new directions or issues. A quarter of the respondents said they were unsure. A fifth thought their school did not genuinely consult them about these things. These proportions are very similar to those in 2013.

Forty-one percent of parents and whānau felt they had enough contact with their school’s trustees, with 28% unsure. A further 28% felt they did not have enough contact with trustees. This is much the same as in previous NZCER national surveys going back more than a decade.

When asked what other information, if any, they would have liked about the school, some parents responded by indicating information that would normally be provided by the board. The largest group of these parents and whānau (9%) wanted more information about the school’s use of funds, 7% wanted to know more about board decisions, 6% about school policies, 5% about the school vision and strategic plan, and 3% wanted more information about the school values. Wanting more information may be related to consultation, but it is not clear in this instance if these parents expected a two-way process, or simply wanted to be better informed.

Eighteen percent of the parents and whānau said there was an area of school life where they would like to have a say and felt they could not, and a further 15% were unsure. Eleven percent each would like more say in how children learn, or the school’s homework policy. Student behaviour, what children learn, and a child’s class or teacher, were identified by 9%. Seven percent identified funding decisions and school uniforms or dress as areas they would like input into, and 5% the support of students’ cultural identity.

Issues raised by parents

Almost half (48%) of trustees said that parents or whānau in their community had raised issues with their board this year. This is a similar proportion to the 2010 and 2013 surveys (47% and 51% respectively). Table 10 shows that discipline/student behaviour/bullying and dissatisfaction with a staff member continue to be two of the most frequently reported issues that parents and whānau raise with school boards. Issues around health and safety were reported more often in 2016 compared with 2010 and 2013. This increase may have been influenced by changes to health and safety legislation which came into force on 4 April 2016.

Quite a few issues were being raised less by parents than in previous years, including fundraising, grounds and maintenance, school zone or enrolment scheme, transport, National Standards, and homework.

TABLE 10 Main issues raised by parents with trustees¹⁰

Issue	2010 (n = 239) %	2013 (n = 277) %	2016 (n = 176) %
Discipline/student behaviour/bullying	21	16	18
Health and safety	12	8	16
Dissatisfaction with a staff member	15	13	16
Funding, including fundraising or spending	15	12	10
School uniform	*	*	7
Grounds/maintenance	11	16	6
Provision for students with special education needs	9	7	6
Transport	9	9	6
Student achievement	8	5	5
Class sizes	6	6	5
Cost for whānau/school donation/fees	*	5	5
Modern learning environments	*	*	4
School zone/enrolment scheme	7	13	4
Provision for Māori	5	4	3
National Standards ¹⁰	*	8	3
Digital technology/e-learning	*	5	3
Curriculum	3	5	2
Theft/vandalism	*	3	2
Homework	9	5	2
Provision for students with English as a second language	5	0	1

* Not asked in that year

¹⁰ Most trustees felt they had a good understanding of National Standards, and over half of the trustees were supportive of them in principle. Just under a quarter said they were unsure about their understanding of National Standards, and were neutral or unsure of their support for National Standards. Trustees' views of National Standards had changed little since they were last surveyed in 2013, except that they were slightly more positive about the amount of support and guidance available to staff to feel confident about the school's work with National Standards.

Parents' participation in board of trustee elections

The triennial elections for boards of trustees offer parents a say in the composition of their school board. These elections were held in June 2016 so parents and whānau had the opportunity to vote in their school's board of trustee elections 2 or 3 months prior to completing the NZCER survey. Schools were not required to hold board elections where the number of candidates did not exceed the number of board positions to be filled.

Forty-four percent of parents responding had voted in these elections, 38% had not voted, and 9% were from schools that did not hold an election (about 10% indicated that they were not sure or did not answer this question).

Of the parents and whānau who voted ($n = 222$), 72% were influenced in their choice by candidates seeming to have skills the school needed, which is noted by ERO as an important factor in board effectiveness (as listed in the Introduction). A candidate having shown previous commitment to the school affected the choices of 65%, and 50% voted for a candidate they knew. Twenty-six percent of the parent and whānau respondents who voted were influenced by a candidate's experience in education. Nine percent were influenced by candidates having been on another board. Three percent reported that nothing really affected their choice; it seemed like a lottery.

Of the parents who said their board had held an election, but who did not vote ($n = 189$), 31% said they did not get around to it, and 29% said it did not seem important who went on the board because all the candidates seemed good. Only 16% said there was not enough information on the candidates to make a decision, or that they did not get the papers in time (10%). Six percent had come to the school after the elections, and 4% either did not recall receiving voting papers or forgot to complete them.

In summary, most boards consult with their community, using a mix of surveys or meetings. There is a wide range of topics consulted about, pointing to differences between schools in what is foremost. Around a fifth of parents thought they were not genuinely consulted, or wanted more of a say in some aspect of school life. There is also variability in the issues that parents raise with their school boards, and it is interesting that 43% of trustees reported no issues being raised with their school board, and another 9% were unsure.

6.

How were boards doing?

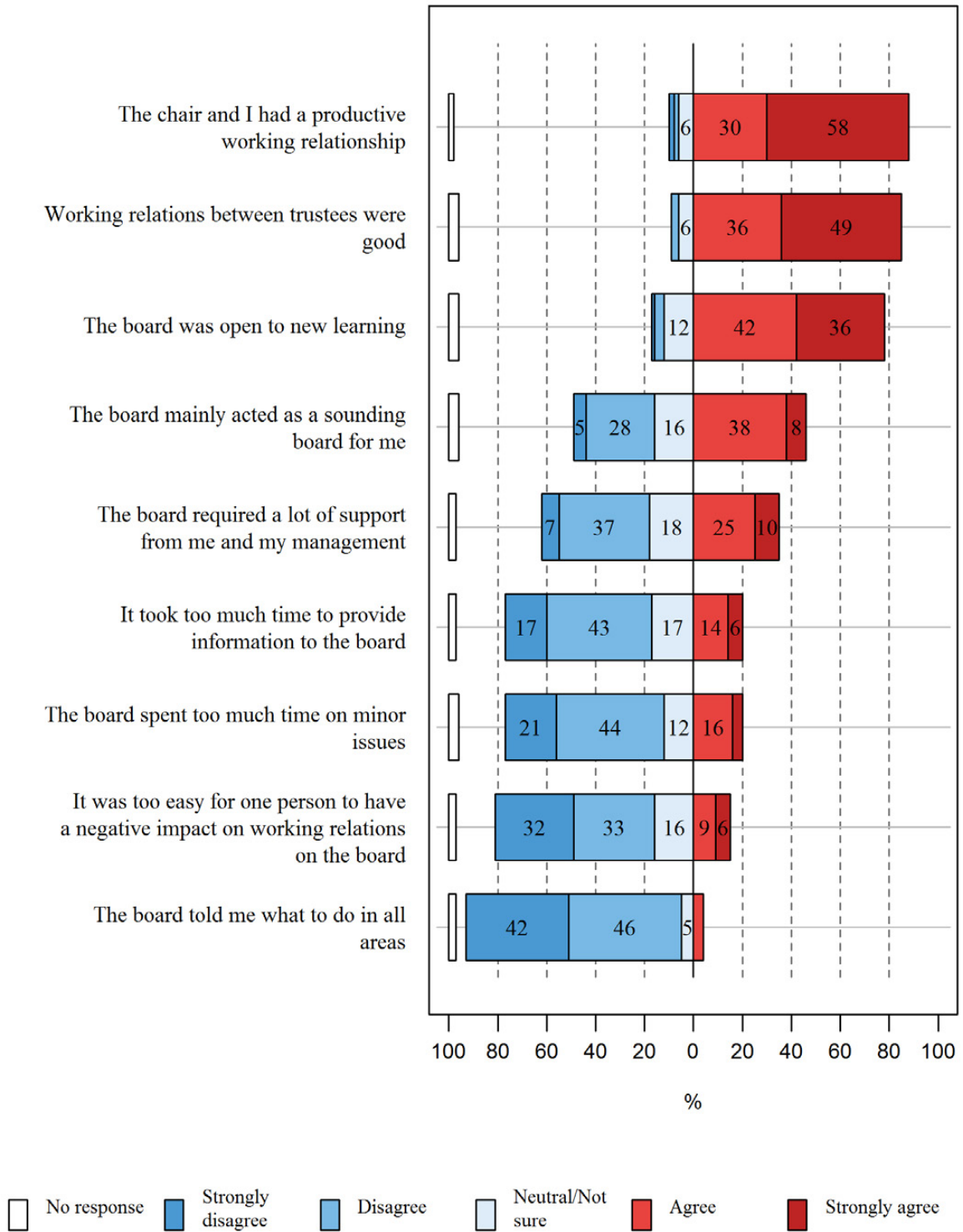
Trustees were generally positive about how well their board was doing. Thirty-one percent thought their board was on top of its task, a small increase from the 26% who thought this in 2013. Sixty-two percent thought that the board was making steady progress (the same as in 2013), and 7% thought that their board was just coping. Only one trustee thought their board was struggling.

Principals, who were asked to report on their board prior to the June 2016 election, were more positive about their board's capability than trustees themselves. Forty-one percent of principals indicated that their board was on top of their task. However, a greater proportion of principals than trustees also saw their boards as coping (10%) or struggling (5%).

This 2016 picture is much the same as in 2013, but more positive than in 2010 when only 16% of trustees and 31% of principals felt their board was 'on top of its task'.

Effective relationships are a key factor in effective governance, and one key relationship is with the principal. Figure 3 shows that most primary and intermediate principals have a good working relationship with their board and that they see their boards as open to new learning. Fewer principals than in 2010 and 2013 indicated that their boards required a lot of support from them (36%, down from 48% in 2013) or that they acted mainly as a sounding board for the principal (47%, compared with 52% in 2013). Fewer principals in 2016 also indicated that their boards spent too much time on minor issues (19%, compared with 31% in 2013).

FIGURE 3 Principals' views of their school's previous board (n = 200)



Board expertise

Trustees were asked to indicate areas where they thought their board needed more experience or skills. Twenty-two percent of trustees said that their board had all the expertise they needed. Most trustees (73%) indicated only three or fewer areas in which more expertise was needed. Table 11 shows the five areas most frequently indicated by trustees (19%–23%) were governance, understanding achievement data, strategic planning, finance, and property. These areas largely correspond with trustee perceptions of the key elements of their role, and the aspects on which their boards spend the most time. The need for more experience or skill with ICT matters has decreased steadily since 2010, and is likely to be a reflection of the increased acceptance and expectation of ICT use in general. Trustees' perception of their boards' need for expertise in law has also decreased over the past three surveys.

TABLE 11 Trustees' views of skills or expertise needed by their board

Area	2016 (<i>n</i> = 176) %
Governance	23
Understanding achievement data	23
Strategic planning	23
Finance	21
Property	19
Law	17
Review of school performance	17
Community consultation	16
Links with local iwi/hapū	15
Employer role (IR/HR)	13
Education	12
Fundraising	11
Public relations	10
Pasifika networks	9
ICT	7
Links with local employers	6
Leadership	6

There were no significant differences between board chairs' and other trustees' views of the areas of need, unlike 2013 when board chairs were more likely to identify the need for external legal support.

As in 2010 and 2013, there was an association between decile and identified need for more board

experience or skills in a range of areas. Trustees from decile 1–2 schools were more likely to indicate needs in these areas: 41% thought their board needed more experience or skills in strategic planning and finance; 35% in the employer role, 28% in links with local iwi or hapū, 21% in Pasifika networks, and 14% in leadership. As we shall see, trustees at these schools also saw more issues facing them, particularly around achievement.

Trustees who thought that their boards had all the expertise they need were more likely to say that their boards were ‘on top of its task’, which affirms the importance or advantage of having a board with skilled and connected people.

Changes to the trustee role

Almost all trustees felt there was something about their role that they would change. Only 5% sought no change. Thirteen percent of the trustees indicated only one change that they would make if they could, and about 60% selected two to five aspects they would change. More funding for schools was the most frequently selected aspect, followed by improving their knowledge or training. The figures in Table 12 suggest that interest in improving knowledge or training, and having more support or advice from the Ministry of Education, has increased. They also suggest there is less interest in having more support from parents and whānau, or external experts, and guidance on using achievement data. There is also less interest in changing the level of collaboration with other schools. This suggests that these aspects have been improving, or that they are at least no longer as much of an issue as they once were. It is possible that the establishment of Communities of Learning | Kāhui Ako¹¹ has influenced the decrease in the proportion of trustees selecting working more with other schools as an area for change.

11 Two-thirds of trustees who responded to the survey were in schools that were in a Community of Learning | Kāhui Ako or in the process of forming or joining one. Almost two-thirds had a clear picture of what a Community of Learning | Kāhui Ako is and what the status of their school was with regard to joining one. The proportion was higher for trustees whose schools were already in a Community of Learning | Kāhui Ako. Some trustees had reservations about whether joining a Community of Learning | Kāhui Ako would advantage their students, were waiting to see how it worked out for other schools, or said that they were satisfied with an existing cluster.

TABLE 12 Main changes trustees would make in their role

Change	2010	2013	2016
	(n = 252) %	(n = 277) %	(n = 176) %
More funding for the school	66	49	53
Improve my knowledge or training	38	43	46
More advice about modern learning environments	*	*	24
Work more with other schools	31	28	22
Reduce Ministry expectations of what we can provide for the funding we get	23	26	22
Clearer distinction between governance and management	26	18	21
More time to focus on strategic issues	20	20	19
More support/advice from Ministry of Education	13	14	19
More support from parents and whānau	31	21	18
More remuneration	12	*	18
More guidance on how to use achievement data to inform board decision making	30	26	15
Reduce community expectations of what we can provide for the funding we get	12	14	14
More support/advice from independent education experts	22	17	13
Reduce workload/paperwork	14	11	10
Better communication between board members	6	8	9
Better information from school staff to inform our decisions	7	11	7
Clearer guidelines to make disciplinary decisions	2	7	6
Reduce expectations for community consultation	4	5	5
Reduce role in disciplinary decisions	2	3	3
More support/advice from NZSTA	5	7	3

* Not asked in that year

Trustees at decile 1–2 schools were the most interested in having more support from parents and whānau (35%).

Board achievements

Good financial monitoring or staying within budget, high or improved quality of teaching, improvements in student progress and achievement, and improved governance headed the list of board achievements over the past year that were identified by trustees, as shown in Table 13 below.

The 2016 trustees who responded to the survey seemed more conservative than in 2013 and 2010 about what they had achieved in relation to student achievement and finances. Fewer reported gaining a good ERO review, which may reflect a lower proportion coming from a school that had been reviewed in the past 12 months. Improvements to building or grounds quality were lower amongst the achievements. As we shall see in Table 14 (next page), property maintenance or development headed the list of issues that trustees saw facing their school, and funding was third.

There was a small increase in those who reported a greater focus on student achievement, and the use of digital technology in learning. There has been a small increase since 2010 in those reporting improvements in Pasifika students' progress as a board achievement. Trustees' views of their achievement in relation to improving Māori students' progress and achievement are unchanged since 2010 and continue to be reported by slightly less than a third of trustees.

TABLE 13 Trustees' views of their board's achievements in past 12 months

Achievement	2010 (n =252) %	2013 (n =277) %	2016 (n = 176) %
Good financial monitoring/stayed within budget	66	70	56
Quality of teaching stayed high or improved	66	64	53
Improved our governance processes (e.g., self-review, use of meetings)	*	*	51
Improvements in student progress and achievement	66	61	51
Greater focus on student achievement	43	43	48
More use of digital technology in learning/e-learning†	34	42	47
Allocated budget in line with school goals	*	*	43
Progress on our school targets	*	51	37
Improved our buildings/grounds	61	49	36
Effective review of the school's charter	*	*	35
Good ERO report	40	46	32
Improved board capability through professional development and advice	*	*	32
Improvement in Māori students' progress and achievement	31	29	30
Increased community/parent involvement in student learning	22	25	22
Improved our provision for students with additional/special learning needs	*	27	21
Greater focus on student wellbeing and inclusion	*	*	18
Successful appointment of principal	12	16	16
Improvements in student behaviour	24	21	15
Successful induction of new principal	*	*	15
Improvements in Pasifika students' progress and achievement	8	12	14
Improvement in student attendance	8	13	10

* Not asked in that year

† 2010 item asked about higher quality IT equipment

Other board achievements noted by a few trustees included the induction of new members, joining a Community of Learning | Kāhui Ako, implementing a school enrolment zone, and greater understanding of new legislation around the Health and Safety, and the Vulnerable Children's Acts.

Trustees from decile 1–2 schools were most likely to identify improvements in student behaviour (35%) and attendance (31%), and with those from decile 3–4 schools, improvement in Pasifika students' progress and achievement (24%).

The school context for trustees' work

Trustees were asked about any major issues their school faced. Overall, the proportions of trustees reporting issues were not high. Property matters, staffing levels / class sizes, and funding (all resourcing issues) were identified as the top three issues facing trustees' schools. Student achievement and engagement of parents and whānau featured in the next set of major issues that trustees saw in their school.

Few trustees thought that motivating students or that student use of technology such as cell phones and social networking sites was a major issue at their school.

Generally, trustees identified fewer major issues facing their school than did principals and teachers, but more than parents identified.

TABLE 14 Trustees' views of major issues facing their school

Major issue	2016 (n = 176) %
Property maintenance or development	43
Staffing levels / class sizes	36
Funding	34
Māori student achievement	25
Parent and whānau engagement	25
Joining a Community of Learning Kāhui Ako	22
Student achievement levels	21
Achievement of students with additional (special) learning needs	21
Cost of maintenance and replacement of digital technology	19
Too much being asked of schools	17
Declining school roll	17
Attracting and/or keeping good teachers	15
Pasifika student achievement	14
Student behaviour	14
Partnerships with iwi and hāpu	13
Adequacy of digital technology and internet access	11

Some major issues identified by trustees were linked to school decile. Student achievement levels were more likely to be reported as a major issue by trustees from decile 1–6 schools, than those from decile 7–10 schools. A similar trend was evident for the achievement of specific groups—Māori, Pasifika, and students with additional learning needs—mirroring differences in the school populations. Trustees identifying student behaviour as a major issue facing their school showed a similar pattern.

7.

Summary and discussion

Trustees are mainly motivated by a desire to contribute to their community, followed by wanting to help their children. As a group they are more highly educated than the national average and most were in paid employment.

Most (81%) had not been on a school board before, but 44% had experience of being on the board of another organisation before they took on the school trustee role. The proportion of trustees with governance experience outside schools has decreased since 2010. However, continuity was not an issue for most boards, despite the proportion for those where it might be an issue being slightly higher than in previous years. The median length of time spent on the school board was 3 years 2 months, the same as in 2013 and 2010. The median length of time served by board chairs was 3 years 3 months, slightly less than the median of 3 years 8 months in 2013.

Just under half the trustees spent 2 hours or less per week on their board work. Board chairs gave more time. Eighteen percent of board chairs spent more than 6 hours a week on board work, an increase since 2013. Twenty-one percent of board chairs thought that the amount of responsibility asked of trustees was too much, compared with 10% of other trustees. Forty percent of principals surveyed also thought too much was asked of trustees.

Trustees, parents, and principals all identified the key elements of the board's role as providing strategic direction for the school, followed by supporting staff and principal, and representing parents and whānau in the school. Few saw that a key element is to be an agent of government or represent government interest.

Overall, boards spent more of their time focusing on student progress and achievement, followed by oversight of property and finance, and on review (such as board policies). Most principals reported that their board's decisions supported the school's strategic plan, that the board had a good understanding of achievement data, and that achievement data played a key role in board decision making about staffing and resources. Principals also felt that board members generally asked good questions related to the school goals and that, overall, the board added value to the school.

Board capability and focus showed some variation. Nineteen percent of principals felt that their board spent too much time on minor issues. Just under half thought that their board mainly acted as a sounding board for them (47%, down from 52% in 2013), and 35% said their board required a lot of support (down from 48% in 2013).

Most trustees and principals were positive about how well their school board is doing, with 93% of trustees and 85% of principals reporting that their boards were on top of things or making steady progress.

The survey data show that there is some alignment between the areas that trustees see as key elements of their role and which they spend time on, and where they would like to have more knowledge or understanding. For example, student progress and achievement is reported as what boards spend the most time on, and understanding of achievement data is one of the prime areas where trustees feel their board needs more expertise.

Trustees identified a range of issues facing their schools that are similar to those reported in 2010 and 2013. These included funding, and funding-related issues of staffing, class sizes, and property maintenance and development. The achievement of Māori students continued to be an issue, but trustees' views show that there was a focus on, and progress was being made in, this area.

Board achievements for the year reported by trustees are headed by having maintained or improved the quality of teaching and student achievement, as well as good financial monitoring. Trustees also noted improved governance processes and self-review as a board achievement.

Most boards had consulted with their parents, whānau, and community in the past year, through a range of means. There was an increasing use of digital technology in the consultation processes, but much less so in decile 1–2 schools where the schools and their families may be less likely to have access to the internet or suitable equipment. About half of the parents responding felt that the school genuinely consults with them about new directions or issues, just over a quarter were not sure, and under a quarter felt they were not genuinely consulted. Some trustees (16%) indicated that community consultation is an area where their board needs more experience. The main topics of board consultation were student achievement, reporting to whānau, and curriculum and subject options. While funding is one of the most common issues reported by schools and trustees, it is not often a topic of consultation with the community.

About half of the trustees said that parents and whānau had raised issues with their board in the past year. The most frequently raised issues were about student behaviour or dissatisfaction with a staff member. There were an increased number of concerns raised by parents about health and safety-related issues, most likely due to a raised awareness of such issues as a result of new legislation coming into force.

Most principals reported having productive working relationships with their board chair, and that the relationships between trustees were good. Most boards review their processes, but only a third did so regularly as recommended, with the majority (48%) saying they did so only sometimes. There was a small increase in the proportion of trustees who reported regular board reviewing since 2013.

Less than a quarter of the trustees surveyed felt they had all the expertise they needed on their board. There was an association between school socioeconomic decile and identified need for more experience or skills in a range of areas. Trustees from decile 1–2 schools were more likely to indicate needs. Governance continues to be one of the main areas where trustees feel they need more expertise, and this is reflected in the uptake of the NZSTA workshop about governance essentials. Other areas that trustees identified as needing more expertise or skills included strategic planning, understanding student achievement data, and property, finance, and legal matters. This range of areas shows that, while it is generally known that trustees' roles should not include involvement with management, they do need enough understanding of what day-to-day management requires in order to be able to govern. Understanding and managing this division is an area that some trustees recognise as unclear, as suggested by the number of trustees (21%) who, when asked what they would change about their role,

wanted clarification of the distinction between governance and management, and the high uptake of the NZSTA workshops on governance.

Trustees were supported in a variety of ways, both from within the school by staff and other trustees, and from external organisations, particularly NZSTA, and to a lesser extent the Ministry of Education and ERO. Most had had some form of professional development for their trustee role over the past 12 months, often in the form of workshops or advisory services provided mostly by NZSTA. Trustees also had access to a range of written and digital resources, such as the downloadable guidelines or information provided by the Ministry of Education and ERO, as well as those offered by NZSTA and through NZSTA membership. Only 14% said that their board had worked with a contracted adviser paid for by the school. Three-quarters of those who were employed had some support for their board work through flexibility of time or use of work equipment or paid time.

Almost all who had undertaken professional development said that it had helped them understand their role as a trustee. For many, particularly board chairs, it ensured compliance with legal requirements and affirmed what they were already doing.

Almost all trustees felt that there were changes that could improve the effectiveness of their role, which suggests a commitment to ongoing improvement. While these changes include some things trustees can do individually or as a board, such as improving their own knowledge, many require involvement from agencies beyond the board or school.

