Secondary Teacher Workload Working Group Report

December 2016

Contents

PART 1: Recommendations of the Workload Working Group[1]

NCEA Recommendations

NCEA - Working Group recommendations
System drivers
1.1   That the Ministry, as part of the review of NCEA in 2018, consider the advantages of reducing the number of credits required to achieve NCEA level 1.
1.2   That the parties to this Report engage schools and the family/whānau/community with messages that NCEA over-assessment is not conducive to high-quality learning and work with them to recommend a maximum number of credits in a student's learning programme annually to reduce over-assessment that has an adverse effects on student wellbeing[2].
1.3   That the parties to this Report strongly recommend that schools focus on NCEA assessment in years 12 and 13.
Resources and information
1.4   That the Ministry and NZQA, with the assistance of subject experts, produce a wider range of high-quality assessment resources focusing on level 2 and 3 standards (both internal and external), which: - promote the assessment of more than one standard within or across subjects and curriculum areas for a particular project and provide indications of units of work into which they could be incorporated   - provide clearer exemplification of grade boundaries   - emphasise quality rather than quantity of evidence, including guidance on the amount of evidence required (eg, indicative word limits)   - are readily accessible from a single website.
1.5   That NZQA continues with the speedy provision of its new web-based application for NCEA moderation and considers what support is needed for its use.
1.6   That the parties to this Report produce a pan-organisation poster that makes clear how NCEA workload can be reduced.
1.7   That NZQA and NZPPTA work on developing joint advice and guidance for schools on the Principal's Nominee role and ensure it is readily accessible.
Addressing over-engineering

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[1] *Note that a number of these recommendations would require additional resourcing. Where further advice is needed, it will be developed to contribute to future Budget processes.*

[2] Note that NZPPTA recommend restricting the number of credits in a student's overall teaching, learning and assessment programme to a maximum of 100 per year.

1.8   That NZQA provide information about NCEA assessment rules and procedures that is readily accessible and clear for all teachers to equip them to address any over-engineering or poor assessment practice in their schools, including making NCEA Myth Busters far more prominent and locatable on NZQA website.

1.9   That the parties to this Report actively discourage excessive NCEA assessment and moderation practices. This should include using Managing National Assessment (MNA) reports to clearly indicate where schools are over-engineering.

1.10 That NZQA, as part of providing high quality support for Principals' Nominees on managing quality assurance at the school level, reviews this support with a view to equipping Principals' Nominees to remove any instances of over-engineering in their schools.

1.11 That NZQA and the Ministry revise their website information, guidelines, forms, cover sheets etc to clarify and quantify their expectations and requirements for NCEA moderation and assessment.

1.12 That NZQA pursue, as a high priority, consideration of whether expectations about 'sufficiency' of NCEA moderation could be reduced.

NCEA - NZPPTA recommendations

1.13 That the 85% NCEA level 2 target is replaced with a range of student outcomes targets.

1.14 That NZQA strongly discourage NCEA assessment before Year 11.

1.15 That there be a roll-based time allowance for the Principals' Nominees role.

1.16 That there be additional time allocations for curriculum middle leaders for the management of NCEA assessment, moderation and administration.

1.17 That a mechanism for compensating teachers with excessive NCEA assessment loads be developed.

1.18 That NZQA investigate ways in which schools could be offered the option of having at least one internally assessed standard per subject and level in which evidence is generated internally but marked externally.

School Management Recommendations

School Management - Working Group recommendations

2.1   That NZSTA and NZPPTA, supported by the Ministry and the Education Council, inform schools of where to find existing best practice advice on good employer practices and actively promote good management practices.

2.2   That the parties to this Report acknowledge that there is a need for appropriate PLD in organisation and personnel management practices which is sector and role specific, which includes provision for future leaders and managers and ask that the Education Council considers this gap as it works with the profession to develop the leadership strategy.

2.3   That the Education Council, as part of the development of its leadership strategy, investigate:

- the scope for more systematic mentoring management skills for leaders and aspiring leaders at all levels by practising leaders
- a process to identify and to enable access to effective practice mentors.

2.4   That NZSTA and NZPPTA encourage Boards of Trustees to undertake staff satisfaction surveys at least every three years as part of their good employer HR practice. This survey should include questions about how effective teaching and learning are supported in the school as well as their workload in relationship to the school operational, management and personnel practices.

2.5   That NZSTA and NZPPTA develop ongoing advice and support for principals and middle and senior leaders to assist in recognising and eliminating individual bullying or bullying cultures.

2.6   That the Ministry, NZPPTA and NZSTA review the wording of the Secondary Teachers' Collective Agreement to provide greater clarity to school managers on its correct implementation.

School Management - NZPPTA recommendations

2.7   That there be a requirement for schools to demonstrate to ERO their career development policy and practices.

2.8   That the monitoring of management and operational practices and personnel management practices form part of ERO reviews of schools to identify whether they are enabling teachers and leaders to concentrate to the greatest extent possible on teaching and learning and leadership of learning.

2.9   That ERO reviews include consideration of whether schools are complying with the Employment Relations Authority (ERA) and with collective agreements provisions.

Kaiako Māori & Pasifika Teachers Recommendations

Kaiako Māori – Working Group recommendations

3.1   That where there is an identified need, the parties to this Report work alongside regional cluster, Communities of Learning | Kāhui Ako and iwi groups to identify the challenges that exist for kaiako Māori and work through potential actions.

3.2   That the Ministry use evidence, such as findings from the Māori Medium Beginning Teacher Retention Pilot, to identify how to provide better support for sole charge kaiako Māori in their Provisionally Certificated Period.

3.3   That where possible and relevant, the parties to this Report help support schools and their staff to have an agreed kaupapa which includes an understanding of the implications for Māori staff arising from cultural obligations and expectations.

3.4   That the Education Council consider strategies to build understanding and capability of leaders to support their Māori staff, through its development of the leadership strategy.

Pasifika – Working Group recommendations

3.5   That the Ministry develops guidelines for Pasifika cultural awareness for teachers and school leaders and explores opportunities with education partners such as the Education Council to promote these guidelines such as linking them to existing standards/criteria.

3.6   That the parties to this Report look for opportunities to support Communities of Learning | Kāhui Ako efforts to meet the needs of Pasifika learners by ensuring staff are culturally competent and capable.

3.7   That the parties to this Report ensure that recruitment and retention initiatives (that support the sector) help increase the number of Pasifika teachers and are responsive to their learning and development needs.

3.8   That the Education Council consider strategies to build understanding and capability of leaders to support their Pasifika staff, through its development of the leadership strategy.

Kaiako Māori & Pasifika – NZPPTA recommendations

3.9   That the Ministry, based on the size of each school's Māori roll, resource community liaison positions per school.

3.10 That the Ministry, based on the size of each school's Pasifika roll, resource community liaison positions per school.

Compliance & Administration Recommendations

Compliance & Administration - Working Group recommendations

4.1 That the Ministry facilitate a cross-sector group to identify key factors that drive compliance and administration workload[3] and agree the highest priority items to address and timeframes.

4.2 That the parties to this Report, where relevant:

- prioritise providing clarity and guidance about what is required to meet compliance obligations
- identify existing and, where needed, develop new good practice on compliance and administration
- direct schools to where they can find good practice, including exemplar materials and case studies

4.3 That the parties to this Report include recognising compliance and administration costs to teaching and learning as part of the internal induction, appraisal and PLD programmes for their own staff.

4.4 That the parties to this Report promote the expertise and potential that support staff have to further reduce the administration and compliance component of a leaders role within a school or across Communities of Learning (CoL) | Kāhui Ako to enable teachers and leaders to focus more on teaching and learning.

4.5 That the parties to this Report encourage schools to transfer to support staff as many necessary compliance and administration tasks as possible to enable teachers to focus on teaching and learning and pastoral care and guidance.

Compliance & Administration - NZPPTA & NZSTA recommendations

4.6 That there be increased and central funding for the number of support staff hours available to secondary schools.

4.7 That the Ministry lead the development of change management protocols at the agency level which incorporate an assessment of additional compliance and administration effects for any proposed change.

4.8 That the agencies consult with sector representatives on the compliance demands involved prior to any new requests or proposals being made that require compliance by schools.

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[3] Scope includes forms, language, timing of requests, targeting (are we asking the right person), guidance, opportunities for synergies across currently unconnected requests (are we asking the right person, at the right time, the right thing, in the right way)? It is outside the scope of this work stream to comment on Government policy or legislation needs, but it can review and comment on the administrative tools used (eg forms and guidance).

Performance Management, Appraisal & Certification Recommendations

Performance Management, Appraisal & Certification - Working Group recommendations
5.1 That the Education Council provide support and clear online information targeting teachers, middle leaders, senior leaders and Boards of Trustees about exactly what the requirements are for performance management, appraisal and certification, with a view to stopping over-engineering of these processes. 5.2 That the Education Council provide detailed guidance on its website specifically directed at Provisionally Certificated Teachers on what a high-quality induction and mentoring programme should look like, and what their options are if this is not being provided for them. 5.3 That the Education Council work with school leaders, NZSTA, NZPPTA, the Ministry and ERO to adopt a more proactive approach with schools to ensure that they provide adequate induction and mentoring programmes to beginning teachers. 5.4 That joint guidance be provided by the Education Council, NZSTA and NZPPTA to schools on appraisal, including advice that requirements for teachers to inquire into their practice as part of appraisal should be relevant to their individual developmental needs and resourced in terms of time, guidance, and access to further learning. 5.5 That the Education Council provide the above agreed advice (recommendation 5.4) on appraisal requirements to schools through teacher and principal organisation structures early in 2017. 5.6 That the parties to the Report agree to promote the critical importance of high-quality performance management and appraisal, both formative and summative, to career development and maintaining collective contribution to raising student achievement outcomes. 5.7 That the Education Council and NZPPTA work together to improve uptake by the secondary sector of PLD programmes on appraisal.

New Initiatives Recommendations

New Initiatives - Working Group recommendations

6.1   That all parties to this Report use their best endeavours to coordinate on changes proposed for schools to provide for a more integrated approach factoring in the likely impact for schools and the education workforce.

6.2   That by the end of June 2017, Education Agencies explore the British Government's response to the Department of Education's Workload Challenge findings on the impact of significant change to see if they have merit in the New Zealand context and make recommendations to their Chief Executives on aspects that can be adopted.

6.3   That the parties to this Report agree to develop resources on change management to assist schools to introduce new initiatives in effective and sustainable ways.

6.4   That the parties to the Secondary Teachers' Collective Agreement and NZSTA agree to review the employment framework, including collective agreements, to assess its ability to be responsive to innovation, while noting the primary importance of providing balance and reasonable protections for employees.

6.5   That any PLD programmes designed and implemented or purchased by education agencies for the development of current and aspiring leaders include a focus on change management skills.

6.6   That the parties to this report encourage schools and Communities of Learning (CoL) | Kāhui Ako to make strategic decisions about the number and nature of initiatives that they undertake at any one time.

New Initiatives - NZPPTA recommendations

6.7   That ERO consider and advise on the effectiveness of school change management practices in school reviews, including the impacts on the quality of the change processes, teacher workload and teaching and learning.

People & Resourcing Recommendations

People & Resourcing – NZPPTA recommendations

7.1   That additional teacher staffing be provided to resource the changes in practices and expectations around teaching and learning, pastoral and guidance and professional leadership.

7.2   That additional, resourced time allowances be provided for the leadership and management functions of middle leadership.

7.3   That the Ministry address the large school class size issue identified in the Secondary Schools' Staffing Group report.

PART 2: Context for this Report

Background to the Secondary Teacher Workload Working Group

1. The Secondary Teacher Workload Working Group (the Working Group) was established as part of the settlement for the 2015-2018 Secondary Teachers' Collective Agreement. It recognised the joint interest that the New Zealand Post Primary Teachers' Association (NZPPTA) and the Ministry of Education (Ministry) have in responding to issues of concern being raised in the sector around secondary teacher workload. This Report follows on from a joint NZPPTA and Ministry report on Secondary School Teacher Supply (August 2016)[4].

2. The Working Group was chaired by Katrina Casey, Acting Secretary for Education. The organisations represented on the Working Group are outlined below:

   - NZPPTA[5]: led by Angela Roberts, NZPPTA President and Jack Boyle, Junior Vice President
   - Ministry of Education: led by Lisa Rogers, Deputy Secretary, to September 2016, then later Karl Le Quesne, Acting Deputy Secretary
   - New Zealand School Trustees Association[6] (NZSTA): represented by Lorraine Kerr, President
   - Education Council: represented by Pauline Barnes, General Manager Professional Services
   - New Zealand Qualifications Authority (NZQA): led by Kristine Kilkelly, Deputy Chief Executive Assessment
   - New Zealand Secondary Principals' Council (NZSPC) and Secondary Principals' Association of New Zealand (SPANZ) represented by James Thomas, Principal of Whangaparoa College.

3. The Working Group's remit, as outlined in its Terms of Reference, is to:

   - identify the key contributors to teacher workload in New Zealand secondary schools[7]
   - review existing evidence on secondary teacher workload to:
     - identify the components of workload which have a negative impact on effective teaching and learning and recruitment and retention of teaching staff
     - consider workload differences for teachers of different roles and employment arrangements
     - consider the differences in workload across schools of different size, rurality, and decile
   - review expectations and requirements of external agencies on effective teaching and school management
   - provide advice to the Minister of Education on the above matters and the range of responses which are available to address any identified concerns.

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[4] http://www.education.govt.nz/assets/Uploads/Secondary-Teacher-Supply-Working-Group-Report-9-August-2016.pdf

[5] NZPPTA is the industrial and professional organisation which represents secondary teachers and leaders in state and integrated secondary schools.

[6] NZSTA is the representative body for the majority of school boards of trustees.

[7] The secondary schooling system in 2015 comprised approximately 275,000 students taught by approximately 25,500 secondary teachers.

4. The Working Group considered a range of workload drivers and agreed to focus on six key areas identified in the NZPPTA Workload Taskforce Report (2015)[8]:

- National Certificate of Educational Achievement (NCEA)
- School Management
- Compliance & Administration
- Performance Management, Appraisal & Certification
- New Initiatives
- People & Resourcing.

5. In addition, as the work progressed, the Working Group agreed that there was a need to highlight the workload issues of Māori and Pasifika teachers and identify ways to address these.

6. To build a picture of what is currently happening in our secondary schools, the Working Group drew on available data, research and visited five schools to obtain further insights into teacher workload. The Working Group also received submissions from eight teachers.

7. This Report:

- provides the rationale for the focus on secondary teacher workload
- summarises key themes identified
- provides conclusions and recommendations on the way forward.

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[8] NZPPTA. *PPTA Workload Taskforce Report: Report of the 2015 investigation into issues of workload intensification for secondary school teachers in New Zealand.* April 2016

Secondary Teacher Workload - The Challenge

8. In New Zealand, education is focused on raising student achievement and lifting the equity of outcomes for all children and young people – our teaching workforce is critical to achieving this.

9. Concern about teacher workload is not a new issue and is not confined to New Zealand[9]. Many teachers are passionate about their work but for some, the workload burden is becoming unmanageable.

10. Workload can impact on teacher satisfaction, retention and wellbeing with a flow-on effect to student learning and wellbeing.

11. If workload is high, teachers are more likely to be dissatisfied with their job, consider leaving the profession and have a poor work-life balance. This issue particularly impacts on teachers and middle managers.

12. This is a complex issue – the causes are diverse and the extent and type of workload issues varies between schools and roles. Solutions are needed at the systemic, school and individual level.

13. This Working Group worked across agencies and organisations, it sought information from a sample of the sector to examine components of this challenge and considered solutions to addressing the workload challenges facing teachers.

14. The Working Group wants to maximise the focus on teaching and learning, and support teacher recruitment and retention, by removing or limiting unnecessary and unproductive demands on teachers and leaders.

15. What we know about secondary teacher workload is informed by several sources, research and insights from schools. Findings from key reports used to inform our work are summarised, where appropriate, in the following sections. A more general overview is provided in Appendix C.

16. In drafting the Report, the parties reflected on the changing expectations of the teaching role and its impact on workload. For example, that there are greater expectations from school leadership, parents and whānau for teachers to engage more with students individually in their academic programme and in their pastoral care, as well as a greater complexity in the management of pastoral and guidance care of students.

17. The parties to this Report committed to developing and agreeing an implementation plan by the end of February 2017.

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[9] https://www.gov.uk/government/publications/reducing-teachers-workload/reducing-teachers-workload ,
https://education.alberta.ca/media/3114984/teacher-workload-study-final-report-december-2015-2.pdf ,
http://www.edu.gov.on.ca/eng/policyfunding/memos/nov2014/etfo_teacherworkloadreport_en.pdf ,

PART 3: Areas of Focus for the Working Group

1. NCEA

Context

18. The National Certificate of Educational Achievement (NCEA) was introduced in 2002 and is the national qualification for secondary school students in New Zealand. NCEA can be awarded at Levels 1, 2 and 3 with students normally commencing study for Level 1 in Year 11 and continuing through Years 12 and 13.

19. Under the previous assessment system, there was relatively little internal assessment in Years 11 and 13, although all of Year 12 was internally assessed for Sixth Form Certificate, with a distribution of grades allocated to a school based on their School Certificate results of the previous year. These were spread among subjects, usually using a means-analysis process. Most assessments for qualifications, other than Sixth Form Certificate, were both generated and marked externally.

20. The introduction of NCEA caused a major shift in assessment procedures in secondary schools[10]. It required schools to move from a norm-referenced assessment model, under which predetermined proportions of students passed and failed, to a standards-referenced model, under which students are assessed against specific criteria. Students are now required to demonstrate competence against specific learning outcomes described in assessment standards[11]. These standards can be assessed either internally (by schools) or externally (usually by public examination). The majority of assessments at all senior year levels are now generated and marked internally.

21. Achievement of an NCEA certificate nominally requires a student to achieve 80 credits at or above a level. However, after Level 1, 20 credits can be carried forward from a previous level, so that the actual number of credits required for Level 2 and 3 is 60, assuming that a student has completed enough credits at the previous level. There is a Government expectation[12] that in 2017, 85% of 18 year olds will have achieved NCEA Level 2 or equivalent.

22. Quality assurance procedures[13] have been established in each school and are monitored by the NZQA.

23. NCEA is recognised by employers and used for selection by universities and polytechnics, both in New Zealand and overseas.

What is the problem?

24. While NCEA is a robust and credible qualification, the implementation of NCEA in schools is reported to be a major contributor to teacher workload.

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[10] NCEA Levels 1-3 replaced School Certificate (SC), Sixth Form Certificate (SFC) and University Bursary (UB) qualifications. SC and UB assessment was predominately norm-referenced and external with most assessment centred on national exams in November. SFC was internally assessed with the grade range available to a school determined by that cohort's performance in SC the year before.

[11] Learning derived from the *New Zealand Curriculum* (NZC) or *Te Marautanga o Aotearoa* (TMoA) is assessed using achievement standards which have been written by MOE as the appropriate Standards Setting Body . For example, an achievement standard derived from the Mathematics and Statistics learning area is: *Apply numeric reasoning in solving problems*. Learning that is derived from a vocational/industry source is assessed using internally assessed unit standards and have been written by an Industry Training Organisation (ITO) with support from NZQA.

[12] Better Public Services (BPS) target.

[13] To ensure assessment for each standard is fair across all students regardless of the school they attend.

What do we know?

25. When considering NCEA workload, the NZPPTA Workload Taskforce Report 2016[14] found:

    a. too little time is available for the quantity of assessment schools undertake and the moderation of the assessment tasks or teacher collaboration within and between schools, searching on line, professional learning, and administration especially relating to progress of individual students

    b. over-engineering in how schools operate their assessment and moderation practices which has added to the workload burden

    c. a perception of constant change around NCEA which can at times be under-resourced and poorly managed, with short deadlines which creates confusion about what is expected

    d. too much assessment. For example, on average, students are entered for twice as many credits as they need to gain an NCEA. The associated assessment and moderation requirements increase the workload of teachers and are also a workload burden for students. The Education Review Office (ERO) has identified this as a wellbeing issue for secondary school students[15]

    e. a perception that excessive moderation expectations exist. These expectations may originate from NZQA quality assurance demands and then are often over engineered in schools

    f. variability in the availability and quality of support materials across curriculum areas and the lack of up-to-date and go-to resources. It is not always easy to find the necessary information for internal assessment on the internet[16].

26. The NZCER 2016 report on secondary schools[17] found while 32% of teachers[18] agreed or strongly agreed that their NCEA-related workload was manageable, 41% of secondary teachers disagreed or strongly disagreed. In addition, 84% of principals agreed that teachers struggle with their NCEA workload and 65% identified NCEA teacher workload as a major issue facing their school (up from 49% in 2012, and 39% in 2009). NZCER found that teachers who supported NCEA were more likely to say they had a manageable workload (65%, compared with 46%) – this finding was also reflected in the ACER Workload Report 2005.

27. The ACER Workload Report 2005[19] demonstrates that concerns about NCEA workload are not new, finding that NCEA was a major factor impacting on teacher workload, although this finding varied across schools and people interviewed.

28. The Principal's Nominee (PN) plays a significant role in the quality assurance of NCEA. The PN monitors the quality assurance processes being followed in all subject areas of the school, and ensures that NZQA assessment rules and procedures are followed.

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[14] Pages 73-78

[15] http://www.ero.govt.nz/publications/wellbeing-for-young-peoples-success-at-secondary-school/

[16] The standard, clarifications, moderator newsletters and potentially the Teaching and Learning Guide should all be consulted on the NZQA website, prior to looking at the specific assessment resources on Te Kete Ipurangi (TKI).

[17] http://www.nzcer.org.nz/system/files/NZCER%20Secondary%20Survey%202015_%20Full%20report_0.pdf page 26

[18] The NZPPTA notes that the NZCER teacher sample over-represents senior leaders as a proportion of the teaching force and 32% may therefore be an overestimate of the proportion of classroom teachers and middle leaders agreeing that NCEA workload is manageable.

[19] Page 60

29. NZPPTA notes that there is no specific provision for management units for a PN and believes that such an important position should have roll-based time allowance and units. The Ministry notes that staffing entitlement is determined using the school roll, resulting in a 'bucket' of resources allocated to the school which it uses as it sees fit in order to meet the needs of the school and community. This 'bucket' includes management units and the allocation of these units to different roles and responsibilities determined by the school. Like any other position, there is no set allocation of management units to the PN position, although the school leadership is able to use them in this way if they choose.

30. NZPPTA also notes that there is minimal preparation available for a new PN, although NZQA School Relationships Managers do provide ongoing advice in addition to the annual half-day meetings of PNs convened by NZQA.

31. The PN role requires someone with good leadership and management qualities and is generally considered a senior leadership role. It is often incorporated into senior management portfolios of work alongside day-to-day management or curriculum leadership.

32. In most schools the PN requires the assistance of support staff to enable them to manage the role's workload, and NZPPTA notes that there is no specific provision for this either[20].

33. Ministry and NZQA data[21] (see following graphs) shows that on average students enter for approximately twice the number of credits than needed to gain an NCEA. The Ministry notes that the same data shows that the introduction of the Better Public Service (BPS) NCEA level 2 target had little effect on the number of credits entered by students, however NZPPTA disagrees with this.
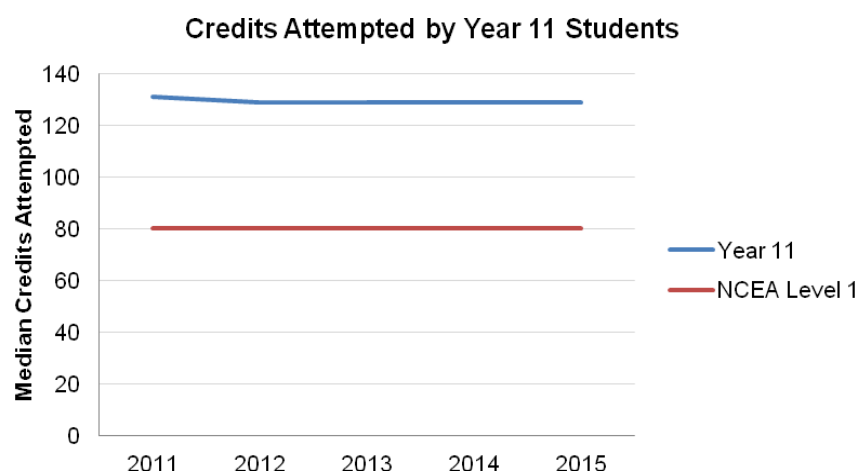
Credits Attempted by Year 11 Students

Credits Attempted by Year 12 and Year 13 Students
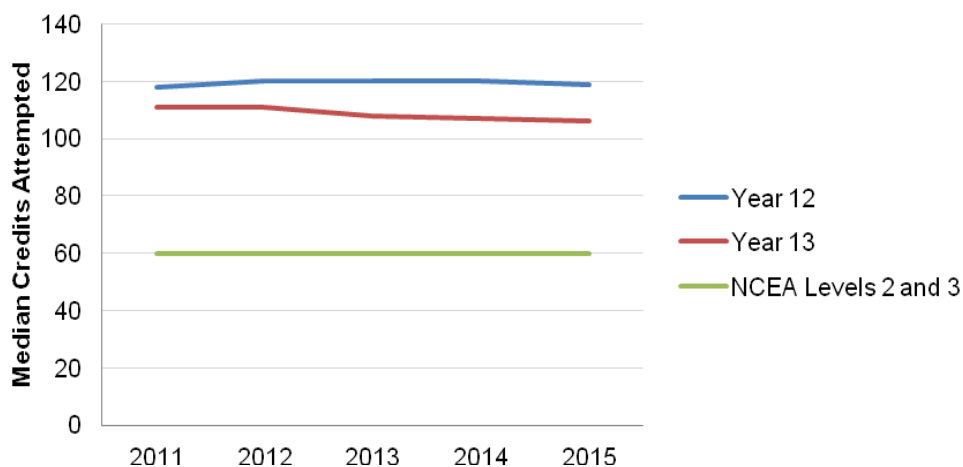
34. NZPPTA maintains that there is sufficient evidence from its survey of members to show that the 85% target is driving behaviours which are questionable in terms of the value to students and creates significant extra workload for teachers. NZPPTA believes that the target can be replaced by much more useful measures of educational outcome to enhance the quality of learning and of qualifications achieved while at the same time reducing unnecessary workload demands on teachers and students.

35. The following graph[22] illustrates that at NCEA Level 2 approximately twice as many internally assessed achievement standards are undertaken compared with external achievement standards[23]. There is also still a relatively high use of unit standards.

> Figure 83 shows a significant reduction in the number of results from the use of Unit Standards in 2012. A decrease in the number of results from the use of Externally-assessed Achievement Standards and an increase in the number of results from the use of Internally-assessed Achievement Standards were evident in 2012.

Number of Results by Standard Type and Assessment at Level 2

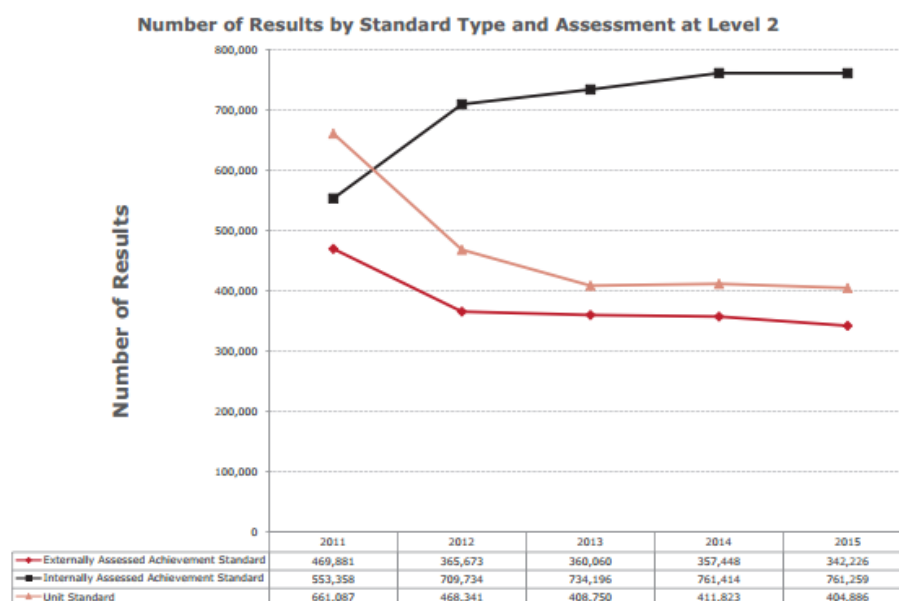|	2011	2012	2013	2014	2015
Externally Assessed Achievement Standard	469,881	365,673	360,060	357,448	342,226
Internally Assessed Achievement Standard	553,358	709,734	734,196	761,414	761,259
Unit Standard	661,087	468,341	408,750	411,823	404,886

Figure 83. Number of results by standard type and assessment at Level 2 from 2011 to 2015

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[22] NZQA. Annual Report on NCEA and New Zealand Scholarship Data and Statistics (2015). June 2016. Figure 83.

[23] this similar to both Levels 1 and 3

36. Workload from NCEA assessment is not limited to the number of standards/credits entered. NZQA reports that teacher/student expectation of the amount/quantity of evidence required is at times excessive. Many samples of student work received for external moderation comprise too much evidence, and this contributes to an increase to teacher marking workload as well as student workload. This applies across most internal standards in most subjects. There is a need to address these expectations by emphasising the importance of the quality, not the quantity, of the evidence required.

37. Drivers of over assessment can be complex – there can be pressure from parents and students, as well as interschool and interdepartmental competition for students. There is a need to better understand these drivers to identify how the focus can change from achieving the greatest number of credits to valuing deep inquiry learning which is a vital component of NCEA.

What have we heard?

38. Representatives of the Working Group visited five schools for the purpose of capturing teacher voice to help develop their recommendations. Several themes regarding NCEA work related issues recurred from the groups of teachers and leaders questioned.

39. The primary area of concern identified with workload was the amount of NCEA assessment and moderation, particularly internal, undertaken within schools. There is a perceived pressure, from parents and senior leaders, to provide a greater number of internal assessments to raise student achievement; exacerbated for single-class subject specialists who must seek external support for their internal moderation, which in itself is time consuming.

40. Teachers spoken to suggested an immediate solution: reduce the number of standards offered per subject to focus on providing quality teaching and learning, which they considered would significantly alleviate demands on their time. They also suggested increasing NCEA preparation time.

41. A sample of teacher, middle leader, senior leader and principal comments from these school visits regarding NCEA and workload follow:

   - *internal moderation adds to workload, especially the administration associated with it. Single teacher subjects must moderate with other schools, this is time consuming*
   - *need support staff time for data crunching; leave us to analyse*
   - *NCEA spikes in workload, especially marking*
   - *NCEA in Year 10 increases workload*
   - *increased internal assessments equals increased stress for students and staff but helps raise achievement*
   - *pressure to do more internal assessment – more external would reduce workload*
   - *high parental pressure for lots of credits, lots of Merits and lots of Excellences*
   - *not enough Te Reo resources*
   - *need sector-wide movement for teaching and learning rather than assessment-driven*
   - *reducing credits – resistance from some teachers – parent/community perceptions*
   - *why 80 credits at level 1?*
   - *internal moderation huge. Small school, all single teacher subjects so must connect externally*
   - *assessments rarely have fixed due dates. Means classes have multiple standards running at once.*

What we are already doing?

42. NZQA has recognised workload issues associated with assessment and moderation in NCEA by:

- developing a **digital moderation application.** This includes two tools:

    i. a tool for internal moderation that enables teachers to upload a sample of student evidence for other teachers to comment on the grade awarded

    ii. a tool for external moderation that allows schools to **upload work samples for external moderation** rather than send paper copies to moderators

- the **Transforming Assessment Praxis Programme (TAP)** - TAP is an online professional learning programme involving professional reading, collaborative activities, and submission of assignments. The aim of TAP is to give teachers more confidence in re-contextualising assessment resources to better meet needs of learners, and to explore diverse and valid ways of collecting evidence for assessment.

43. NZPPTA believes that, of these, only the internal moderation component of the digital moderation application has potential to reduce teacher workload.

44. A review of NCEA in 2018 may provide an opportunity to undertake a national discussion on issues such as over assessment, over-engineering, competition, parental expectations and quality pathways.

NCEA Recommendations

NCEA - Working Group recommendations
System drivers
1.1   That the Ministry, as part of the review of NCEA in 2018, consider the advantages of reducing the number of credits required to achieve NCEA level 1.
1.2   That the parties to this Report engage schools and the family/whānau/community with messages that NCEA over-assessment is not conducive to high-quality learning and work with them to recommend a maximum number of credits in a student's learning programme annually to reduce over-assessment that has an adverse effects on student wellbeing[24].
1.3   That the parties to this Report strongly recommend that schools focus on NCEA assessment in years 12 and 13.
Resources and information
1.4   That the Ministry and NZQA, with the assistance of subject experts, produce a wider

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[24] Note that NZPPTA recommend restricting the number of credits in a student's overall teaching, learning and assessment programme to a maximum of 100 per year.

range of high-quality assessment resources focusing on level 2 and 3 standards (both internal and external), which:

- promote the assessment of more than one standard within or across subjects and curriculum areas for a particular project and provide indications of units of work into which they could be incorporated
- provide clearer exemplification of grade boundaries
- emphasise quality rather than quantity of evidence, including guidance on the amount of evidence required (eg, indicative word limits)
- are readily accessible from a single website.

1.5   That NZQA continues with the speedy provision of its new web-based application for NCEA moderation and considers what support is needed for its use.

1.6   That the parties to this Report produce a pan-organisation poster that makes clear how NCEA workload can be reduced.

1.7   That NZQA and NZPPTA work on developing joint advice and guidance for schools on the Principal's Nominee role and ensure it is readily accessible.

Addressing over-engineering

1.8   That NZQA provide information about NCEA assessment rules and procedures that is readily accessible and clear for all teachers to equip them to address any over-engineering or poor assessment practice in their schools, including making NCEA Myth Busters far more prominent and locatable on NZQA website.

1.9   That the parties to this Report actively discourage excessive NCEA assessment and moderation practices. This should include using Managing National Assessment (MNA) reports to clearly indicate where schools are over-engineering.

1.10   That NZQA, as part of providing high quality support for Principals' Nominees on managing quality assurance at the school level, reviews this support with a view to equipping Principals' Nominees to remove any instances of over-engineering in their schools.

1.11   That NZQA and the Ministry revise their website information, guidelines, forms, cover sheets etc to clarify and quantify their expectations and requirements for NCEA moderation and assessment.

1.12   That NZQA pursue, as a high priority, consideration of whether expectations about 'sufficiency' of NCEA moderation could be reduced.

NCEA - NZPPTA recommendations

1.13 That the 85% NCEA level 2 target is replaced with a range of student outcomes targets.

1.14 That NZQA strongly discourage NCEA assessment before Year 11.

1.15 That there be a roll-based time allowance for the Principals' Nominees role.

1.16 That there be additional time allocations for curriculum middle leaders for the management of NCEA assessment, moderation and administration.

1.17 That a mechanism for compensating teachers with excessive NCEA assessment loads be developed.

1.18 That NZQA investigate ways in which schools could be offered the option of having at least one internally assessed standard per subject and level in which evidence is generated internally but marked externally.

2. School Management

Context

45. Every school needs systems that create conditions for staff and students to work effectively together with simple, clear goals and effective processes. These systems are crucial in sustaining quality teaching and learning for valued outcomes.

46. Teachers are responsible for ensuring all their students achieve to the best of their abilities, and they need to be supported in this endeavour by an environment in which this can happen. School leaders also need to offer a safe environment for their staff and students.

What is the problem?

47. Some practices associated with managing schools create workload pressures[25] that divert teachers' and middle leaders' attention away from teaching and learning and professional leadership.

48. In this section, parties have focused solely on school management, as a component of leadership. We recognise that both are important, but note that the NZPPTA Workload Taskforce Report 2016 highlighted the impact of poor management practices on workload. These practices can include poor human resources (HR) practices, excessive or poorly run meetings, or inadequate consultation. Even in situations where a school may have visionary leadership, poor management practices can hinder progress.

What do we know?

49. Both the NZPPTA Workload Taskforce Report 2016[26] and NZCER 2016 report on secondary schools 2016[27] found school management practices were identified by teachers as contributing to workload pressures.   The NZPPTA Workload Taskforce Report 2016 emphasised the disparity of effective leadership and management capability and practices across the secondary schooling sector.

50. It is recognised that workload pressures may result from external agency requirements and/or be generated by principals and senior leaders. These pressures tend to manifest in the workload of middle leaders and teachers into the classroom and can impact on teacher and student wellbeing and outcomes and distract teachers from teaching and learning. Issues found with individual school management practices are, namely, the absence of good management practices and effective systems, and professional / good employer treatment of staff by senior leaders.

51. Management problems are not confined to principal leaders. They begin with middle leaders being unprepared for many organisational and employee management aspects of their role and continue with senior leaders being unprepared for those roles, particularly when principals delegate the organisation and personnel management to those senior leaders without adequate support and planning.

52. Feedback from the NZPPTA Workload Taskforce Report 2016[28] indicates that a small number of schools have a bullying management culture and, in some, excessive workload is a consequence of that culture.

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[25] recognising that these pressures may not be common to all schools

[26] Pages 33 & 37

[27] Page 67

[28] Pages 91-92

53. The NZCER 2016 report on secondary schools[29] noted that 55% of secondary schools surveyed had difficulty filling middle management positions, largely attributed to perceptions by possible applicants of the workload required.

54. It can be a vicious cycle – larger workloads can hamper teachers' and leaders' professional development, but also a lack of quality PLD which is focussed on developing management skills may increase workload (their own and/or others) as they may not be well prepared for certain organisational management skills and employment relations aspects of their leadership role.

55. The parties to the Report recognise the importance of developing management skills alongside leadership skills for both senior and middle leaders.

56. NZPPTA also reports that there are some provisions in parts 3 and 5 of the Secondary Teachers' Collective Agreement (STCA) which are regularly misunderstood by school management, and notes that more clarity around the wording of such provisions, without change to the existing intent of the provisions, would assist principals with their implementation and reduce unnecessary workload pressures on teachers.

What have we heard?

57. Representatives of the Working Group visited five schools for the purpose of capturing teacher voice to help develop their recommendations. The theme that emerged around school management from the teachers interviewed was that ineffective practice resulted in increased workload. An example of this was regular staff meetings that required the attendance of all staff but addressed issues that involved very few of them. Schools suggested that fewer routine meetings and smaller meetings with relevant staff would mitigate the workload issues arising from management practices in their school.

58. Samples of their comments regarding school management follow:

- *pressure from senior leadership wanting everyone to pass*
- *workload not on agenda or discussed at meetings*
- *new senior leaders want to have an impact, put their stamp on something, but this creates more work for those delivering the core business*
- *reduced staff meetings - reduced teacher voice*
- *lack of consultation – having to come in earlier to school for PLD*
- *a lot of reproduction of data*
- *have to go through too many processes to get a decision from the top. Need more delegated decision-making*
- *schoolwide assessment plan exists, but not used by teachers to plan timing of trips, etc.*
- *emails over the weekend – can't identify where expectation to answer comes from – no guidelines*
- *HoD opinions on appointments overruled*
- *review of allocation of staffing within the school in respect of senior leadership vs teachers*
- *no lab technician but the school offers Science. A beginning teacher does it without pay or time*
- *no property manager, principal least qualified but has to do it, takes away from teaching/learning.*

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[29] Page 137

What are we already doing?

Communities of Learning (CoL) | Kāhui Ako

59. As they develop, the Ministry expects Communities of Learning (CoL) | Kāhui Ako to provide support for emerging middle and senior leaders. The leadership and cross-community roles can facilitate the sharing of leadership expertise and good management practice and enhance knowledge and capability. Good administrative practices across the CoL can reduce management burden.

60. NZPPTA believes this is problematic as there is often only one secondary school per CoL and that the risk of sharing poor management practice is high and there is a lack of external advice and PLD on HR and organisational management skills.

Supporting leadership within and across the system

61. The Education Council is establishing its Centre for Leadership Excellence which will hold a body of collective knowledge in leadership best practice, strategies and research.

62. Alongside the ongoing support provided by regional senior advisers and Student Achievement Function advisers, the Ministry has developed an interim support package for leadership. This will also support management skills and will be in place for the next two years. This interim package will focus on:

    a. tailored induction, development and mentoring for beginning principals
    b. support for emerging leaders which identifies and nurtures leadership, including middle and senior leadership, within CoL
    c. expert partners who will be available to support those already in leadership roles in CoL
    d. strengthening leadership of learning focused on national priorities as an outcome of all PLD.

63. Other agencies provide specialist support for principals and their boards. For example, NZSTA provides support in specialist areas related to health and safety, human resources, governance, leadership, finance, community, internal evaluation and whānau engagement.

64. There are many sector groups and organisations which facilitate early support for school leaders, for example, various principal groups and the unions.

65. NZPPTA notes that such programmes will assist with the type of management problems identified only if they have, and retain, a strong focus on the development of practical organisational management skills, human resource management, change management skills, and good employer practices, led by those with strong skills in this area, followed up by ongoing support and advice. They should also be accessible to leaders and potential leaders outside CoL.

School Management Recommendations

School Management - Working Group recommendations

2.1 That NZSTA and NZPPTA, supported by the Ministry and the Education Council, inform schools of where to find existing best practice advice on good employer practices and actively promote good management practices.

2.2 That the parties to this Report acknowledge that there is a need for appropriate PLD in organisation and personnel management practices which is sector and role specific, which includes provision for future leaders and managers and ask that the Education Council considers this gap as it works with the profession to develop the leadership strategy.

2.3 That the Education Council, as part of the development of its leadership strategy, investigate:

- the scope for more systematic mentoring management skills for leaders and aspiring leaders at all levels by practising leaders
- a process to identify and to enable access to effective practice mentors.

2.4 That NZSTA and NZPPTA encourage Boards of Trustees to undertake staff satisfaction surveys at least every three years as part of their good employer HR practice. This survey should include questions about how effective teaching and learning are supported in the school as well as their workload in relationship to the school operational, management and personnel practices.

2.5 That NZSTA and NZPPTA develop ongoing advice and support for principals and middle and senior leaders to assist in recognising and eliminating individual bullying or bullying cultures.

2.6 That the Ministry, NZPPTA and NZSTA review the wording of the Secondary Teachers' Collective Agreement to provide greater clarity to school managers on its correct implementation.

School Management - NZPPTA recommendations

2.7 That there be a requirement for schools to demonstrate to ERO their career development policy and practices.

2.8 That the monitoring of management and operational practices and personnel management practices form part of ERO reviews of schools to identify whether they are enabling teachers and leaders to concentrate to the greatest extent possible on teaching and learning and leadership of learning.

2.9 That ERO reviews include consideration of whether schools are complying with the Employment Relations Authority (ERA) and with collective agreements provisions.

3. Kaiako Māori & Pasifika Teachers

Context

66. The number of Māori and Pasifika secondary teachers is small. Māori teachers comprise approximately 8% of the total secondary teaching workforce, and Pasifika 3%[30]. By comparison, Māori students make up around 13% of the total school population and 15% of the total New Zealand population, while Pasifika students make up about 10% of the total secondary school student population and 7% of the total New Zealand population.

What is the problem?

67. Māori and Pasifika teachers report being expected, both professionally and culturally, to undertake tasks and responsibilities beyond those expected of a secondary teacher who does not identify as Māori or Pasifika because of their cultural and language skills. These extra expectations almost inevitably result in heavy workloads if not well managed by school leadership.

What do we know?

68. Quality teaching is most effective within schools in raising student achievement. Quality teaching practice that acknowledges and reflects the Māori and Pasifika learners' identity, language and culture significantly enhances student educational engagement, achievement and success.

69. Māori and Pasifika teachers often feel a strong sense of responsibility to go above and beyond for their students, families, and communities. Their communities also expect teachers of their ethnicity to be available to them for reasons which are beyond the experience of most non Māori and Pasifika teachers[31]. Māori and Pasifika teachers report feeling that some schools use this level of commitment to their communities to the schools' advantage without appropriate recognition.

70. The NZCER 2016 report on secondary schools[32] found that only 50% of teachers felt their professional learning had provided practical help for engaging with Māori students and their parents and whanau[33], while fewer (just over 30%) had experienced professional learning that helped them engage with Pasifika students.

71. Whānau groups of parents usually assist the teacher with kapa haka, waka ama, Ngā Manu Kōrero and fundraising tasks. Some whānau groups have formed high-level relationships with their schools by working to Terms of Reference or Memoranda of Understanding and develop their own strategic plans, provide relief for the teacher's extra curricula responsibilities and assist the school with kaupapa Māori tasks so the teacher can focus on teaching. This type of whānau group is dependent on the skill set of whānau members and the relationship with the school's Senior Management Team and principal.

72. The additional workload pressures currently faced by Māori teachers are largely unchanged from those identified in the 1996 Bloor report on Māori Teacher Workload[34].

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[30] Education Counts.

[31] An example of this is when issues of 'classroom management' arise where inappropriate behaviour involves Māori or Pasifika students, the school will call on their Māori or Pasifika teacher to manage the situation.

[32] Page 74

[33] This was higher in decile 1-4 schools (59%) compared with 48% for deciles 5-10.

[34] Bloor, D J. The Workloads of Māori Secondary School Teachers. A National Survey. Final Report. May 1996

Pasifika

73. The Pasifika Education Plan 2013-2017 identifies the need to build Pasifika competencies across the education workforce to ensure that all schools and teachers are responsive to the needs of Pasifika learners.[35]

74. The term 'Pasifika' often masks the great diversity and ethnic-specific differences that exists between each Pasifika group. This adds another level of complexity for the Pasifika teacher who is expected to work with Pasifika students with different cultural and linguistic backgrounds from their own.

75. Pasifika teachers often work and liaise with families and community leaders from a variety of Pasifika communities which can be extensive, resource-intensive and time-consuming. Such activities usually occur in the evening or weekends when parents, families and community leaders are available.

76. For Pasifika teachers, we have been told that the added cultural responsibilities have resulted in burn out for many who then became disillusioned and left the profession. Better data is needed in this area to help support efforts to address high turnover and attrition issues for Pasifika teachers.

77. The growth rate in the number of Pasifika teachers and principals is not keeping pace with the increase in the number of Pasifika students in secondary schools. This is problematic because the teaching workforce is not reflective of demographics of its students.

Māori

78. In 2012 those schools requiring teachers proficient in Te Reo Māori had difficulties obtaining relief teachers. Two-thirds of primary and secondary schools requiring teachers proficient in Te Reo Māori reported finding it 'very difficult' to get relief teachers and, in addition, just over one-quarter found it 'somewhat difficult'[36]. We believe that this remains the situation in 2016[37]. This can have a significant impact on the ability of Māori teachers to undertake PLD.

Māori medium secondary schools

79. The Māori Medium Reference Group[38] noted that multiple skills are demanded of teachers in Māori medium. They must:

    a. be fluent in Te Reo Māori
    b. have curriculum content knowledge
    c. understand language pedagogy
    d. have skills in learner assessment
    e. be able to effectively respond to the diverse learning and language needs of their students, most of whom are learners of Māori as an additional language.

80. Further, Māori medium teachers are also required to uphold tikanga Māori, drawing from their own iwi background. This is in addition to curriculum content knowledge. The predominantly urban background of Māori medium teachers means that if they have not been closely connected to their own iwi as a source of confidence in tikanga Māori, their initial teacher education programmes need to fill this gap.

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[35] Pasifika Education Plan 2013-2017 http://www.education.govt.nz/ministry-of-education/overall-strategies-and-policies/pasifika-education-plan-2013-2017/

[36] Lee, M. (2012).

[37] Observations and feedback from the Retention Pilot Programme for Māori Medium Beginning Teachers.

[38] July 2012

81. There is however, a lack of high-quality programmes and programme deliverers that can support raising the language and curriculum proficiency of Māori teachers and currently they are all situated in the central North Island. It would be prudent of the education sector to turn to Iwi who have their own education strategies to leverage off their tikanga and language expertise. Many iwi have their own strategies focused on raising the achievement levels of their iwi-affiliated students through developing programmes that will focus on iwi language proficiency, tikanga and working alongside initial teacher education programmes to raise the capability of Māori teacher and initial teacher education providers.

82. In addition to engagement with learners in Te Reo Māori, Māori medium teachers engage with parents, whānau, iwi and community as an essential component of Māori medium education. Current initial teacher education programmes are unlikely to have adequately prepared them to develop relationships and work closely with whānau, iwi and community.

83. During the course of their career, Māori medium teachers often need to be flexible enough to work in different Māori medium education settings, and with different age levels, even though they may not have been trained to do so.

English medium secondary schools

84. Kaiako Māori in English medium settings have the same cultural expectations placed upon them, but suffer the disadvantage of being relatively isolated within their school setting. They carry the cultural responsibilities, the role of 'cultural advisor' to the school, and are often the point of call for dealing with Māori student and whānau liaison. In addition, they may well be running the language department and are frequently new to their teaching career.

85. There is a high expectation that they will participate in and usually lead kapa haka for the school as well as take responsibility for cultural events and formal activities such as powhiri. Māori teachers are also often called on to provide cultural development and advice to their non-Māori colleagues.

86. The NZPPTA Workload Taskforce Report 2016[39] notes that Māori Provisionally Certificated Teachers:

   i.   often go to small schools where they are (in actuality or in practice) the Head of Department Māori. The workload of being both a beginning teacher and a head of department and their additional cultural expectations sets these teachers up for early burnout

   ii. are expected to provide for Māori students, whether there are 2 or 150, as if they were a fully-qualified teacher

   iii. often teach multi-level senior classes, which can constitute an excessive workload for beginning teachers.

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[39] Page 53

Leadership

87. Amongst other issues, the NZPPTA Workload Taskforce Report 2016 noted that constructive, supportive relationships with the school's senior leadership are seen as critical, but there is often a lack of support from senior leadership for the role of kaiako Māori in schools.

88. In some schools the lack of senior leadership support and the absence of other Māori/Pasifika staff is mitigated by the school's community groups. These groups are made up of family/whānau of the school's student population.

89. Growing understanding, capability and capacity of leaders to fully support their Māori/Pasifika staff is important for the system.

What have we heard?

90. Representatives of the Working Group visited five schools for the purpose of capturing teacher voice. A sample of teacher, middle leader, senior leader and principal comments from these schools regarding the expectations and tasks undertaken by Māori and Pasifika staff that add to workload follow:

- *expectation Māori teachers at hand to do welcomes, ceremonies, pastoral care for Māori students, whānau contact, consultant/advisor to SLT, event management*
- *staff will sometimes be required to support student attending a tangi. This may be overnight*
- *Māori teacher has to be ready to organise pōwhiri, often out of school hours*
- *expectation for Māori teacher to attend kapa haka festival. Means travel and weekend away*
- *Te Reo – not enough resources online, can't buy exams, felt NZQA changed assessment specifications without consultation.*

What are we already doing?

91. Work is underway to develop and complete a Pasifika cultural competencies framework for teachers and school leaders of Pasifika learners. This framework could also support efforts to address and increase Pasifika cultural awareness components in teacher training programmes, PLD and governance training.

92. Initiatives, such as Communities of Learning (CoL) | Kāhui Ako, provide opportunities to share, develop and grow Māori and Pasifika expertise, and cultural competencies and awareness within and across CoL. However, CoL leaders need to be careful that they do not exacerbate workload problems for Māori and Pasifika teachers due to increased expectations to share cultural expertise with colleagues across schools.

93. The Education Council is facilitating the development of a leadership strategy for the whole profession that will shape how capability development is supported in the future.

94. The Retention Pilot Programme for Māori Medium Beginning Teachers (the Pilot), being undertaken between 2014 and 2016, provides new professional learning models and the development of mentoring retention programmes for newly-qualified Māori medium beginning teacher. Although primarily in the primary setting, the new learnings from the Pilot will increase our understanding, in Māori medium, of issues and (potential solutions) for beginning teachers, including workload and retention.

Kaiako Māori & Pasifika Teachers Recommendations

Kaiako Māori – Working Group recommendations

3.1 That where there is an identified need, the parties to this Report work alongside regional cluster, Communities of Learning | Kāhui Ako and iwi groups to identify the challenges that exist for kaiako Māori and work through potential actions.

3.2 That the Ministry use evidence, such as findings from the Māori Medium Beginning Teacher Retention Pilot, to identify how to provide better support for sole charge kaiako Māori in their Provisionally Certificated Period.

3.3 That where possible and relevant, the parties to this Report help support schools and their staff to have an agreed kaupapa which includes an understanding of the implications for Māori staff arising from cultural obligations and expectations.

3.4 That the Education Council consider strategies to build understanding and capability of leaders to support their Māori staff, through its development of the leadership strategy.

Pasifika – Working Group recommendations

3.5 That the Ministry develops guidelines for Pasifika cultural awareness for teachers and school leaders and explores opportunities with education partners such as the Education Council to promote these guidelines such as linking them to existing standards/criteria.

3.6 That the parties to this Report look for opportunities to support Communities of Learning | Kāhui Ako efforts to meet the needs of Pasifika learners by ensuring staff are culturally competent and capable.

3.7 That the parties to this Report ensure that recruitment and retention initiatives (that support the sector) help increase the number of Pasifika teachers and are responsive to their learning and development needs.

3.8 That the Education Council consider strategies to build understanding and capability of leaders to support their Pasifika staff, through its development of the leadership strategy.

Kaiako Māori & Pasifika – NZPPTA recommendations

3.9 That the Ministry, based on the size of each school's Māori roll, resource community liaison positions per school.

3.10 That the Ministry, based on the size of each school's Pasifika roll, resource community liaison positions per school.

4. Compliance & Administration

Context

95. School leadership teams are accountable for ensuring their school is compliant with all relevant legislation and policy. There are also significant administrative tasks within the school context driven in part by the requirements or practices of government agencies, requirements of collective agreements and legislation and, in part, by school practice and policies.

96. Compliance with legal requirements is an integral part of the provision of an environment that supports students' learning. In all education reviews, ERO considers compliance with legal requirements along with the implementation of school policies and practices and the impact of these on student achievement.

What is the problem?

97. Compliance and administration tasks are a necessary and important aspect of any organisation. They provide a platform for a safe working and learning environment, support functions such as payroll and school resourcing, and the development and collection of quality information about learners and employees in the school.

98. When done poorly, eg, without clarity around the context, or when the amount of compliance or the number of administrative tasks required and the time required to fulfil them are excessive, these tasks can distract teachers and middle leaders from the core business of learning and teaching for the purpose of enhancing outcomes for all students.

What do we know?

99. Unnecessary compliance and administration tasks were identified as workload pressures in the NZPPTA Workload Taskforce Report 2016[40] and the NZCER 2016 report on secondary schools[41]. They are also referenced in the 2005 ACER Secondary Teacher Workload Report[42].

100. There is a range of administrative work associated with teaching, leadership and pastoral care including reporting, meetings, data collection, management and analysis, surveys, parent contact, health and safety, organising relief, photocopying, NCEA administration tasks (eg, record keeping, data analysis), appraisal and registration requirements, Special Education applications, IT management and support. These are often delegated from the principal to senior leaders to departments and middle leaders and teachers. Administration tasks are often shared with support staff, and reductions in support staff hours or numbers can affect the balance of that work.

101. There are also compliance costs and demands in meeting legislative requirements, including new or amended legislation. For example, the Health and Safety at Work Act 2015, which introduced additional (but essential) requirements, has affected some curriculum areas more than others (eg. Outdoor Education and Physical Education, Science and Technology).

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[40] Page 33 & 37
[41] Page 67
[42] Pages 176-177

102. It is likely that schools can meet compliance and administration demands more efficiently, and that schools may generate unnecessary demands, or fail to review existing processes which may be outdated when requirements change[43]. However, requirements do change and the schools believe that agencies are not aware of the cumulative effect of compliance requirements at the school level.

103. Administration requirements and delegated duties associated with meeting compliance requirements are a significant additional workload pressure for many teachers in middle leadership positions, who generally maintain a high teaching load in addition to their professional departmental and curriculum leadership and HR functions.

104. The English Department of Education Workload Challenge[44] found that:

- one of the major causes of unnecessary workload was reporting and administration – respondents highlighted recording, inputting, monitoring and analysing data (56%) as some of the main contributors
- respondents noted that, rather than the work itself being unproductive, the level of detail, duplication and volume of these tasks was a major problem
- respondents noted the need to read and respond to a large number of emails which contributed to workload
- respondents wanted more effective delegation of tasks – they felt that more effective use of support staff would make a huge difference to workload and believed they weren't always being deployed as well as they could be.

105. The Alberta Teacher Workload Study[45] found teachers spent a significant amount of time on microtasks[46] during the school day, such as emails, texts and interacting with colleagues, and teachers noted that these tasks interrupted their work-related performance and contributed to their work-related stress. The study found that teachers working longer hours spent more time on microtasks compared with teachers working less time (those working 46 hours or more spent 60 minutes or more on microtasks compared with 44 hours and 30 minutes respectively).

106. In both the NZPPTA Workload Taskforce Report 2016[47] and in the 2005 ACER report on Secondary Teacher Workload[48] teachers and middle and senior leaders identified increased access to support staff time as a way of transferring from them a number of administrative tasks.

107. The NZCER 2016 report on secondary schools[49] found 29% of teachers wanted more support staff (33% in decile 1 and 2 schools).

What have we heard?

108. Representatives of the Working Group visited five schools for the purpose of capturing teacher voice to help in the development of their recommendations. In these schools, teachers reported numerous tasks associated with compliance and administration that they consider added to their workload. These included the reproducing information and data for reporting, monitoring attendance, planning, financial reporting, health & safety and vulnerable children; which all required "endless" amounts of paperwork.

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[43] Schools are not unique in this and other workplaces have these issues.

[44] https://www.gov.uk/government/uploads/system/uploads/attachment_data/file/415874/Government_Response_to_the_Workload_Challenge.pdf Pages 4-6

[45] R.A. Malatest & Associates Ltd. Alberta Teacher Workload Study, December 2015 (Alberta Education) Page 49

[46] MIcrotasks are task performed during the progress of other activities which take a small amount of time, eg, texts, emails or interacting with colleagues or parents.

[47] Page 89

[48] Page 9

[49] Pages 82-83

109. Several comments were made to the effect that the administrative tasks associated with NCEA were also taking teachers away from their core business of teaching and learning. These included monitoring large projects, marking student work (adding stress in particular to middle leaders' workload when supervising beginning teachers) including resubmissions, and entering marks with the schools management system (KAMAR).

110. Those interviewed provided several suggestions for how these activities could reduce their workloads. These included; that relevant education agencies develop a co-ordinated approach for information and data retrieval to minimise the overlap of compliance requirements, and that the education agencies produce exemplar materials and generic templates to assist and support schools with compliance requirements.

111. In addition, they felt that support staff could be better managed within schools to provide additional administrative support to teachers. For example: following up student lateness and absence; management of day relief; completion of data entry tasks, and marking student work.

112. A sample of teacher, middle leader, senior leader and principal comments from these schools regarding compliance and administration tasks that adds to workload follows:

- *so many surveys to complete: postgraduate students, government agencies, local government, health...*
- *all visits from MoE, ERO, etc, require copious amounts of documentation*
- *disconnection between agencies – all demand data but seems little cross talk to see if it's the same*
- *producing statistics and other information for board report*
- *academic coaching – three-way conferences with parents to prepare for and run*
- *interaction with parents increased*
- *chasing absences – administration monitors them but deans have to follow up*
- *admin support would really help – follow up lates/absences, last-minute copying, book buses, etc.*
- *do something about the Health & Safety & EOTC workloads*
- *Government needs to provide exemplars, e.g. what does a school health & safety policy look like?*
- *over-engineering of school systems/expectations*
- *too much paperwork*
- *taking notes at meetings*
- *testing and applications: migrants, international students, ESOL.*

What are we already doing?

113. ERO has produced Guidelines for the Board Assurance Statement and Self-Audit Checklists[50] which contain:

- a brief outline of the key legal requirements with which school boards must comply

- checklists to be completed by school boards and principals as part of a self-review process to assist boards and ERO in reviewing legal compliance

- an assurance statement to be signed by the board chairperson and principal providing evidence of the board's compliance with legal requirements.

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[50] Assurance Statement and Self-Audit Checklists, Education Review Office, July 2015.

Support staff

114. School support staff make up a third of school employees and have an important role in enabling teachers and leaders to focus on teaching and learning. In recent years agreed changes to grading and remuneration structures for support staff, and associated guidance (developed through joint work between the relevant union, the NZSTA, and the Ministry), have enhanced schools' ability to tailor the roles and functions of support staff.

115. The NZPPTA note that some administrative tasks cannot be transferred from teachers and leaders. However, if the number of support staff hours in schools was increased then this would allow them to take more administrative duties away from teachers and from those in leadership roles. This would assist in reducing the administrative burden on teachers and leaders and enable them to focus more effectively on their own teaching, management and leadership roles.

116. With greater levels of administrative support in some areas, such as property management, finance and payroll, principals may be given more space to take advantage of opportunities to develop their organisational, personnel management and broader leadership skills and focus more on leadership of learning. The Ministry believes that the development of Communities of Learning (CoL) | Kāhui Ako may facilitate this.

Compliance & Administration Recommendations

Compliance & Administration - Working Group recommendations

4.1 That the Ministry facilitate a cross-sector group to identify key factors that drive compliance and administration workload51 and agree the highest priority items to address and timeframes.
 	
4.2   That the parties to this Report, where relevant:
 	
    • prioritise providing clarity and guidance about what is required to meet compliance obligations
    • identify existing and, where needed, develop new good practice on compliance and administration
    • direct schools to where they can find good practice, including exemplar materials and case studies
 	
4.3 That the parties to this Report include recognising compliance and administration costs to teaching and learning as part of the internal induction, appraisal and PLD programmes for their own staff.
 	
4.4 That the parties to this Report promote the expertise and potential that support staff have to further reduce the administration and compliance component of a leaders role within a school or across Communities of Learning (CoL)
	Kāhui Ako to enable teachers and leaders to focus more on teaching and learning.

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[51] Scope includes forms, language, timing of requests, targeting (are we asking the right person), guidance, opportunities for synergies across currently unconnected requests (are we asking the right person, at the right time, the right thing, in the right way)? It is outside the scope of this work stream to comment on Government policy or legislation needs, but it can review and comment on the administrative tools used (eg forms and guidance).

4.5 That the parties to this Report encourage schools to transfer to support staff as many necessary compliance and administration tasks as possible to enable teachers to focus on teaching and learning and pastoral care and guidance.

Compliance & Administration - NZPPTA & NZSTA recommendations

4.6 That there be increased and central funding for the number of support staff hours available to secondary schools.

4.7 That the Ministry lead the development of change management protocols at the agency level which incorporate an assessment of additional compliance and administration effects for any proposed change.

4.8 That the agencies consult with sector representatives on the compliance demands involved prior to any new requests or proposals being made that require compliance by schools.

5. Performance Management, Appraisal & Certification

Context

117. The functions, roles and responsibilities associated with the management of teacher performance are distributed across the Ministry, Education Council, schools and ERO. The performance management framework aims to ensure that all students in New Zealand schools experience effective teaching.

118. The framework for teacher performance management incorporates both accountability and improvement purposes. In the context of self-managing schools, the board of trustees is accountable for overall personnel management, while responsibility for staff performance management is usually delegated to the principal. School leaders, therefore, have a pivotal role in establishing the school conditions for teacher appraisal, the quality and implementation of teacher appraisal procedures, the links with school goals, and the use of appraisal results for improvement.

119. The outcomes of teacher appraisal are used for different purposes. These purposes include: inducting and mentoring beginning teachers, renewing teachers' practising certificates, attestation for the purposes of salary progression and improving professional practice[52].

120. If appraisal is done well, student achievement improves and the appraisee is focused on their authentic professional learning goals, and the organisational need for accountability is met[53].

121. There are currently two sets of professional standards:

- *Practising Teacher Criteria* which guide decisions about whether to recommend beginning teachers for full certification and for the three-yearly renewal of experienced teachers' practising certificates

- professional standards found in Teachers' and Principals' Collective Agreements which are used to guide annual appraisals (usually alongside the Practising Teacher Criteria), make judgements about attestation for pay increments and determine whether competency procedures should be invoked.

122. The Education Council has contracted ERO to audit at least 10% of appraisals for those practising certificates issued or renewed in the last year, across secondary, primary and early childhood sectors. The auditing data is collected and audits split into four groups: Issued Satisfactory, Issued Unsatisfactory, Renewed Satisfactory and Renewed Unsatisfactory.

123. In considering these four groups, ERO consider at their site visit the evidence and make the satisfactory/not satisfactory judgement that endorsements by professional leaders were based on meaningful appraisal and that the appraisals achieved a reasonable and consistent standard.

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[52] https://www.educationcounts.govt.nz/publications/schooling/oecd-review-on-evaluation-and-assessment-frameworks-for-improving-school-outcomes/chapter-5-teacher-appraisal
[53] https://educationcouncil.org.nz/sites/default/files/AoT%20Phase%20One%20Workshop%20One.pdf

What is the problem?

124. Performance management, appraisal and certification are essential requirements for professional credibility and play a critical role in a robust education system. However, these processes are not always efficient and effective and this can result in unnecessary work for teachers, and middle and senior leaders.

What do we know?

125. The NZPPTA Workload Taskforce Report 2016[54] notes that while teacher appraisal and assessment is a relatively small component of workload for teachers and middle managers, appraisal was found to be an area of workload concern as it created unproductive pressures on teachers and middle leaders.

126. The NZPPTA Workload Taskforce Report 2016[55] found that:

   - each school can interpret the requirements for appraisal and evidence required differently – some schools manage the process well with minimal intrusion and are using the process for professional learning and development, while others place excessive demands on teachers with little developmental value

   - over-engineering of the appraisal and certification process is a significant issue in some schools and misinformation can contribute to this, for example, after the Practising Teacher Criteria were published some PLD providers delivered courses with inaccurate information about the processes required to evidence the standards

   - poor appraisal management processes in schools leave teachers confused and doing things at the last minute or retrospectively

   - middle leaders battle to get through appraisal as well as other workload

   - issues vary considerably across schools, and many see the paper work associated with appraisal and certification as having limited positive impact on teaching and learning.

127. The Education Council does not support the over-engineering of the appraisal processes and has the minimum requirements indicated on its website. Its advice is that the focus of appraisal should be on an example of practice, and then the demonstration of how that practice holistically meets all the criteria.

128. The NZPPTA's middle leadership survey[56] found that curriculum middle leaders identified changes in performance appraisal requirements as one of the biggest pressures on them. NZPPTA's discussions with teachers, including in our school visits, suggest that these changes include the requirement to provide evidence for all 12 criteria from each of the three years prior to applying for certification, increased demands for documentation for all teachers rather than just beginning teachers, and a greater focus on teacher inquiry as part of appraisal processes.

129. The ACER Workload report 2005[57] identified middle leaders as those most affected by workload, largely related to areas of accountability requirements, resource management and performance review. Their ability to support and lead their colleagues professionally was seen to be compromised as a result of workload pressures.

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[54] Pages 37 & 87
[55] Page 87
[56] Page 87
[57] Page 184

130. One undesirable outcome is that some Provisionally Certificated Teachers, especially those in fixed-term positions, are often not given the support they need to achieve full certification[58,] and because of their insecure employment, even if they themselves know what's required, they may not feel able to change this.

131. In 2013, using information from online surveys and 200 school reviews, ERO found that only 4% of secondary schools had high-quality appraisal systems[59]. They found that these schools looked at the impact of changes in teaching practice on student achievement results, often used *Teaching as Inquiry* process and balanced professional accountability with a strong desire to make improvements for their student.

What have we heard?

132. Representatives of the Working Group visited five schools for the purpose of capturing teacher voice to help develop their recommendations. Feedback on performance management, appraisal and certification from teachers in these schools varied significantly between schools. Some teachers reported that there was a lot of paper work associated with preparing evidence portfolios, particularly around providing evidence for all 12 of the Practising Teacher Criteria within each school year. Some commented on the lack of expertise to support them through appraisal which requires providing evidence of their inquiry.

133. A sample of teacher, middle leader, senior leader and principal comments from these schools regarding compliance and administration tasks that adds to workload follows:

   - *while summary documents brief, evidence kept by teachers much more extensive*
   - *teacher appraisal, including inquiry – documenting evidence is onerous, and for all 12 PTCs*
   - *SLT decide the 4 PTCs to focus on each year, aligned with charter, strategy*
   - *school used a model for teacher appraisal that operated on a two-year cycle. ERO not happy with this so back to one year cycle*
   - *not getting any feedback because senior staff bogged down*
   - *Kia Eke Panuku – great observation tool (Rongahia te hou) but time consuming*
   - *inquiry and PLD used to build capability of attestation and appraisal*
   - *appraisal process for a regular teacher is as big as that required for competency procedures*
   - *beginning teachers add to workload*
   - *some of SLT involvement could be carried out by support staff.*

What are we already doing?

134. The Education Council[60], NZSTA and the NZPPTA publish appraisal and performance management good practice guides. The Council has developed templates, systems and PLD to make appraisal more manageable for all schools and teachers.

135. For the 3.5 years prior to 2016 the Teachers Council, now the Education Council, provided a range of PLD on appraisal systems and evidence for appraisal to various groups. This was open to all schools and all teachers. The Council advises that those who attended reported a clear understanding of what is necessary and sufficient. The

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[58] NZPPTA Conference paper: Teachers in the precariat: fixed-term contracts and the effect on establishing teachers.

[59] http://www.ero.govt.nz/publications/supporting-school-improvement-through-effective-teacher-appraisal/ Page 8

[60] https://educationcouncil.org.nz/content/appraisal-professional-learning-and-resources

Council currently has resources on its website and highlights available resources to teachers and updates them as needed.

136. The Council is currently reviewing the Practising Teacher Criteria and will consult the sector on these in the near future.

Performance Management, Appraisal & Certification Recommendations

Performance Management, Appraisal & Certification - Working Group recommendations
5.1   That the Education Council provide support and clear online information targeting teachers, middle leaders, senior leaders and Boards of Trustees about exactly what the requirements are for performance management, appraisal and certification, with a view to stopping over-engineering of these processes.
5.2   That the Education Council provide detailed guidance on its website specifically directed at Provisionally Certificated Teachers on what a high-quality induction and mentoring programme should look like, and what their options are if this is not being provided for them.
5.3   That the Education Council work with school leaders, NZSTA, NZPPTA, the Ministry and ERO to adopt a more proactive approach with schools to ensure that they provide adequate induction and mentoring programmes to beginning teachers.
5.4   That joint guidance be provided by the Education Council, NZSTA and NZPPTA to schools on appraisal, including advice that requirements for teachers to inquire into their practice as part of appraisal should be relevant to their individual developmental needs and resourced in terms of time, guidance, and access to further learning.
5.5   That the Education Council provide the above agreed advice (recommendation 5.4) on appraisal requirements to schools through teacher and principal organisation structures early in 2017.
5.6   That the parties to the Report agree to promote the critical importance of high-quality performance management and appraisal, both formative and summative, to career development and maintaining collective contribution to raising student achievement outcomes.
5.7   That the Education Council and NZPPTA work together to improve uptake by the secondary sector of PLD programmes on appraisal.

6. New Initiatives

Context

137. An initiative is a new plan or process to achieve something or solve a problem. Initiatives may begin at a school, regional or national level. At the heart of these initiatives is an attempt to change some aspect of school practice for the better. 'New initiatives' in this context includes significant changes to existing initiatives.

What is the problem?

138. The schooling system is large and complex. It is inherently difficult to fully consider the implications of a new initiative with existing commitments, timeframes and resources and this can have an impact on school staff, including teacher, workloads.

What do we know?

139. In NZPPTA's Workload Taskforce Report 2016[61,] new initiatives are seen as taking a significant component of teacher and middle leader time[62.] In their comments, teachers broadly identified two key issues pertaining to new initiatives, namely the:

- number of new initiatives they had to engage with each year.
- lack of effective change management associated with the new initiatives, including poor timing of initiatives, particularly external.

140. The impacts of these two issues are to:

- increase workload and consume time, compounding when there are multiple initiatives
- distract from teaching and learning and from middle leadership responsibilities
- expend energy and resources not necessarily justified by the expected or actual outcomes
- frustrate teachers already feeling swamped with compliance and administration
- create a sense of constant churn which can impact on morale.

141. The NZCER 2016 report on secondary schools[63] found 46% of its teachers would like to reduce the number of initiatives at any one time – this is consistent with the 2012 and 2009 findings.

142. In response to the Workload Challenge, teachers in England told the Government that they would welcome more time to prepare for large-scale reform. In response, the Department of Education[64] is to introduce a one-year minimum lead-in time for significant changes to accountability, curriculum and qualifications, and, along with the Office for Standards in Education (OFSTED), will not make changes to qualifications during a course. However, when changes are urgently needed, there is the option of a Ministerial override which will be transparent with reasons provided. In addition, the Minster will do more to consider the impact on schools when introducing significant policy changes.

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[61] Pages 11, 29 & 30

[62] both groups of teachers with heavy teaching loads and therefore with relatively little flexibility in their work programmes

[63] Page 82

[64] https://www.gov.uk/government/uploads/system/uploads/attachment_data/file/415874/Government_Response_to_the_Workload_Challenge.pdf Page 9

143. In its report, Raising Achievement in Secondary Schools (June 2014)[65], ERO recommended that schools '*regularly review their strategies for target groups of students, and determine which approaches are working and which should be discontinued*.'

144. Senior leaders tend to be more positive about new initiatives than their colleagues. The NZPPTA's middle leadership survey[66] found that middle leaders are less enthusiastic about the degree and timing of change. There is a sense that changes could be better co-ordinated and communicated from the senior leadership level to the middle leaders who often have to operationalise them.

145. Initiatives are driven both at the systems level and within schools, but in the NZPPTA Workload Taskforce Report 2016[67] it is not clear whether teachers outside of senior leadership can easily distinguish between school-initiated or externally-driven initiatives or whether school leadership fails to distinguish between the two.

146. An example of the time pressures faced by teachers is highlighted by NZCER 2016 report on secondary schools[68] in the push to use more digital technology in teaching. A number of teachers felt that their school rushed implementation, and teachers found it took time to become familiar with it and integrate it into their teaching practice.

147. Improvements in change management would appear to offer quite wide-reaching benefits, to large numbers of teachers and middle leaders in particular. Twenty percent of respondents to the Workload Challenge in England felt that changes to the implementation of new initiatives provided a good opportunity to reduce workload[69].

148. Real change will require effective change management practices at both the system and the school level. There needs to be planning for change, considering the overall coherence of the wider initiative load along with what the initiative is trying to achieve, adequacy of resources, timing of implementation and impact on staff workload.

What have we heard?

149. Representatives of the Working Group visited five schools for the purpose of capturing teacher voice to help develop their recommendations. In a number of these schools, teachers and leaders were critical of both the number of new initiatives and how they were implemented, and noted that these factors had a significant impact on their teaching practice.

150. Teachers reported that new national, local and within-school initiatives were started without evidence or PLD for all staff, never piloted and not given enough time to bed in or be evaluated before another initiative was started. One teacher commented that 'we are initiative-rich but time poor', which in their view reflects the broader issues at all levels around change management.

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[65] http://www.ero.govt.nz/publications/raising-achievement-in-secondary-schools/ Page 25
[66] Page 33
[67] Page 83
[68] Page 41
[69] https://www.gov.uk/government/uploads/system/uploads/attachment_data/file/415874/Government_Response_to_the_Workload_Challenge.pdf Page 5

151. A sample of teacher, middle leader, senior leader and principal comments from these schools regarding new initiatives that adds to workload follow:

- *initiatives initiated from principal then some consultation*
- *new senior leaders want to put their stamp on something but this creates more work for teachers*
- *big picture (initiative) means teachers have classes and students doing self-directed learning at the same time*
- *big learning curve to get 100% Bring Your Own Device (BYOD) in 2 years*
- *BYOD puts big pressure on less IT-literate. More PD time needed to develop IT*
- *frequent new initiatives a big problem*
- *new initiatives start before previous/current initiatives are complete or evaluated*
- *school initiatives should be evaluated before progressing to the next*
- *no opportunity to review progress – not part of an inquiry process*
- *take something away whenever you introduce something new*
- *change management is not done well here. More and more is added but they don't take anything away*
- *initiatives starting without evidence that there will be positive impact*
- *innovative school – new initiatives require PD for whole staff*
- *new initiatives not subject specific and not well supported*
- *constant change is very exhausting*
- *some teachers have stopped being learners and become task-focused.*

What are we already doing?

152. In 2013, NZPPTA published its *Education Change Management Toolkit*[70] which aims to assist schools in implementing change.

153. OECD has also published a School Leadership Toolkit[71] which provides practical evidence-based approaches to assist school teams to self-diagnose and determine their priorities for action. This includes an action planning guide, which helps people begin to plan and allocate resources effectively, while building understanding, consensus, shared ownership and a sound foundation for collective action planning. NZPPTA does not endorse this resource for the purpose of guidance on effective change management in this context.

154. Currently mandated within the Secondary Collective Agreements' there are:

- 45 10-week sabbaticals annually for approximately 320 secondary principals
- 10 sabbatical leave awards per year for approximately 1,000 senior leaders
- 40 sabbatical leave awards per year for over 21,000 middle leaders and classroom teachers.

155. The provision of these professional leadership and management development opportunities provides principals, senior leaders and teachers extensive periods of release time – in part to focus on agreed particular challenges aligned with their school or professional and career objectives, and in part to provide a break in which they can refresh, reflect and rejuvenate.

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[70] http://ppta.org.nz/resources/publication-list/2460-change-management - updated in 2016
[71] https://www.oecd.org/edu/school/44339174.pdf

156. While sabbaticals could be better utilised to develop change management knowledge and skills for some individuals, this is not a strategy for comprehensive development of change management skills across the sector.

New Initiatives Recommendations

New Initiatives - Working Group recommendations

6.1 That all parties to this Report use their best endeavours to coordinate on changes proposed for schools to provide for a more integrated approach factoring in the likely impact for schools and the education workforce.

6.2 That by the end of June 2017, Education Agencies explore the British Government's response to the Department of Education's Workload Challenge findings on the impact of significant change to see if they have merit in the New Zealand context and make recommendations to their Chief Executives on aspects that can be adopted.

6.3 That the parties to this Report agree to develop resources on change management to assist schools to introduce new initiatives in effective and sustainable ways.

6.4 That the parties to the Secondary Teachers' Collective Agreement and NZSTA agree to review the employment framework, including collective agreements, to assess its ability to be responsive to innovation, while noting the primary importance of providing balance and reasonable protections for employees.

6.5 That any PLD programmes designed and implemented or purchased by education agencies for the development of current and aspiring leaders include a focus on change management skills.

6.6 That the parties to this report encourage schools and Communities of Learning (CoL) | Kāhui Ako to make strategic decisions about the number and nature of initiatives that they undertake at any one time.

New Initiatives - NZPPTA recommendations

6.7 That ERO consider and advise on the effectiveness of school change management practices in school reviews, including the impacts on the quality of the change processes, teacher workload and teaching and learning.

7. People & Resourcing

Context

157. The work undertaken in schools is split between leaders, teachers and support staff.

What is the problem?

158. Many responses to PPTA's Workload Taskforce[72] referenced too little time and too few people to manage the workload demands on teachers. These issues were reflected in the NZCER 2016 report on secondary schools[73].

What do we know?

159. The findings from the NZPPTA's middle leadership survey[74] highlight the particular lack of time relative to the expected management, HR and curriculum leadership functions of middle leaders and the lack of time allocated to middle leaders in pastoral and guidance roles in schools, who generally carry near full teaching loads in addition to their middle leadership role.

Class size

160. Schools make a range of decisions around the curriculum offered to their students which can impact on class size. If they choose to support classes with small numbers this has a flow-on effect to other class sizes. Large class sizes can also result from schools attempting to reduce time table clashes for students by running additional classes of the same subject.

161. The Secondary Schools' Staffing Group (SSSG) report (2012)[75] notes that '*as school size increases:*

- *curriculum entitlement becomes a larger proportion of total entitlement staffing, (designed to support small schools that lack the economies of scale required to provide comparable curriculum breadth to large schools)*
- *the management staffing as a proportion of total staffing reduces*
- *the proportion of staffing available for guidance and pastoral care reduces'.*

162. NZPPTA notes that the quantum of large schools in Auckland means class size is a particular issue here and that solutions to this issue would have significant benefits in reducing workloads in Auckland schools.

163. Large senior classes can generate significant NCEA assessment pressures for teachers. Multiple NCEA levels or programmes operated within a single class can also be a workload pressure.

164. The NZCER 2016 report on secondary schools[76] noted that 41% of teachers wanted reduced class sizes (47% of classroom teachers and 52% overall in large schools). In

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[72] Page 82
[73] Page 82
[74] Page 32
[75] Ministry of Education and NZPPTA. Report of the Secondary Schools' Staffing Group, 2012. Page 6
[76] Page 82

addition, 24% of principals thought their school's staffing entitlement was enough[77], with 76% using locally raised funds to hire additional staff[78].

165. There has been an increase in schools' expectations for teachers to engage in academic mentoring of students. This requires small tutor / form groups to be effective and manageable.

166. The NZCER 2016 report on secondary schools found 51% of teachers wanted more non-contact time to work with other teachers (60% in large schools)[79].

What have we heard?

167. Representatives of the Working Group visited five schools for the purpose of capturing teacher voice to help develop their recommendations. Many of the solutions proposed by those interviewed regarding the issues associated with a lack of people and time involved suggest additional resources to meet the challenges schools are currently dealing with. Those suggestions included the reduction in; class size, contact time, staffing ratios, professional development (reading and learning), and extracurricular activities.

168. A sample of teacher, middle leader, senior leader and principal comments from these schools regarding issues and solutions relating to people and time relating to workload follows:

- *smaller classes would help*
- *improve staffing ratios*
- *reduce contact to 16 hours per week*
- *recognise extracurricular*
- *all the extra demands need to be done within existing contact / non-contact*
- *don't have time for lesson planning and preparation, working through breaks, no time to talk to other teachers*
- *a key addition would be several careers officers in schools*
- *additional Specialist Classroom Teacher*
- *bigger Senior Leadership Team has helped*
- *more support time, technical staff and teacher aides*
- *property manager takes time off principal*
- *provision of admin support for teachers, follow up lateness and absences would help*
- *consider introducing teaching assistants like in UK*
- *new teacher adds to workload of middle leaders*
- *combined classes are demanding*
- *guidance counsellor run ragged so deans pick up more work*
- *planning for inclusive classrooms time consuming*
- *we could double our pastoral team and still keep them busy.*

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[77] Page 140
[78] Page 4
[79] Page 82

People & Resourcing Recommendations

People & Resourcing – NZPPTA recommendations
7.1 That additional teacher staffing be provided to resource the changes in practices and expectations around teaching and learning, pastoral and guidance and professional leadership. 7.2 That additional, resourced time allowances be provided for the leadership and management functions of middle leadership. 7.3 That the Ministry address the large school class size issue identified in the Secondary Schools' Staffing Group report.

PART 4: Appendices

Contents

Appendix A: The Secondary Teacher Workload Working Group and Processes

'*Terms of Reference: Secondary Teacher Workload Working Party*[80]

Functions

169. *The working group's scope will include:*
   - ➢ *Identify the key contributors to teacher workload in NZ secondary schools*
   - ➢ *Review existing evidence on secondary teacher workload to:*
     - *Identify the components of workload which have a negative impact on effective teaching and learning and recruitment and retention of teaching staff*
     - *Consider workload differences for teachers of different roles and employment arrangements*
     - *Consider workload differences in workload across schools of different size, rurality, and decile.*
   - ➢ *Review expectations and requirements of external agencies on effective teaching and school management*
   - ➢ *Provide advice to the Minister of Education on the above matters and on the range of responses which are available to address any identified concerns*

Composition

170. *The Secretary for Education will chair the Secondary Teacher Workload Working Group composed of:*
   - ➢ *4 representatives from the Ministry of Education*
   - ➢ *1 representative from NZSTA*
   - ➢ *1 representative jointly nominated from NZSPC and SPANZ*
   - ➢ *4 representatives from NZPPTA*
   - ➢ *1 representative from the Education Council*
   - ➢ *up to 2 representatives from NZQA.*

171. *NZPPTA and the Ministry will provide a joint secretariat for the group. The group may from time to time invite representatives of other organisations to assist them by the provision of information relevant to the work of the group.*

Timeframe

172. *The Group will convene before 28th July 2016 and will complete its final report to the Minister of Education by 14th December 2016.*

173. *The group will meet monthly.*

174. *The Secretary may call any technical meetings required between the Ministry of Education and NZPPTA representatives between meetings to progress work between monthly meetings.'*

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[80] Secondary Teachers' Collective Agreement 2015-2018. Attachment A (Page 110)
http://www.education.govt.nz/school/running-a-school/employing-and-managing-staff/collective-agreements/secondary-teachers-collective-agreement/

Processes of the Working Group

175. The Working Group met three times from August to December 2016[81]. It was supported by a Technical Group which operated between meetings.

176. The organisations represented on the Working Group shared data, reports and local and international research.

177. Representatives from the Technical Group visited five secondary schools[82] in October to obtain insight into workload issues. Interviews were held with principals, senior leaders, middle leaders and teachers.   The run-sheet for the school meetings can be found in Appendix B which outlines the focus questions and approach.

School	Interview groups
A	Principal 2 senior leaders 6 middle leaders 4 teachers
B	Principal 4 senior leaders 5 middle leaders
C	Principal 9 middle leaders and teachers
D	3 senior leaders 3 middle leaders 5 teachers
E	2 senior leaders 3 middle and senior leaders 6 teachers

178. Submissions were also received from eight teachers. It is recognised that information gained from both the school visits and submissions is difficult to interpret given the limited number of schools and teachers participating, but they do provide some insights into workload pressures teachers are facing.

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[81] 12 August, 12 October and 30 November 2016.

[82] Twenty-one secondary schools were invited to participate and five agreed to meet with representatives from the working group.   The NZPPTA selected the schools to invite as a sample of New Zealand secondary schools.

Appendix B: Run Sheet for Workload Meetings with Schools

School: [insert details]
Date: [insert details]
Time: [insert details]
Sessions: [Teachers, Middle Leaders or Senior Leaders]

Workload Technical Group attendees:
- NZPPTA – [insert details]
- Ministry of Education - [insert details]
- Other - [insert details]

School outline:
[insert details]

Meeting Purpose: To better understand secondary school workload issues, with particular focus on teachers and middle leaders, by undertaking in-depth interviews to better understand the real issues around workload (deep dive interview techniques).

Note:
Let the teachers / leaders do the talking:
- **Encourage Stories:** Whether or not the stories people tell are true, they reveal how the user thinks about the world. Stories reveal what people find normal, acceptable and believe to be true. A good interview should let the user elaborate on the answers similar to a conversation.
- **Look for inconsistencies:** Sometimes what people say and what they do are different. These inconsistencies often hide interesting insights. Interviewers need to ask about these inconsistencies during an interview.
- **Follow up with why questions:** Even when the interviewer thinks they know the answer, the interviewer needs to ask people why they say or do things. The answers might surprise the interviewer.
- **Listen to verbal and nonverbal cues:** Be aware of emotions and body language as a way of using the interview to build empathy for the user.

The interviewer does the listening:
- **Don't suggest answers:** Even if someone pauses before answering, don't help them by suggesting an answer. This can unintentionally get a person to say things that agree with the interviewer's expectations.
- **Ask questions neutrally:** "What do you think about this idea?" is a better question than "Don't you think this idea is great?" because the first question doesn't imply there is a right answer.
- **Don't be afraid of silence:** Interviewers often feel the need to ask another question when there is a pause. Sometimes if you allow there to be silence, a person will reflect on what they've just said and say something deeper.

Time	Who	Activity	Example Prompts

5 min		• Thank everyone for coming along and giving up their time.
		• Introduce yourselves and provide a quick summary of the Workload Working Group and what we are trying to achieve by talking with schools.
		• Invite people to give their first name and what their interest is in attending
		• Note that previous work on teaching workload has indicated that the following are factors that have an impact on workload:
		  • NCEA and assessment
		  • Administration and compliance
		  • School operation, systems, practices
		  • Teacher appraisal, registration and attestation
		  • New initiatives
		  • Time and people
		We would be interested in hearing more about these and other workload issues.
		• Note that this is part of a series of conversations with teaching professionals across the secondary sector
		• Ask if everyone is comfortable with recording the session for our team to check later to make sure we don't miss anything
		• Explain that we won't be linking their names or the school to what we produce
		• Acknowledge that we really appreciate free and frank feedback. No one in the room will take negative feedback personally or badly – the more honest the better as we want to better meet the needs of teachers and middle leaders when we can.	

10 min		Question 1: Can you describe which tasks take up too much of your time? Where do these come from?	Why does X take up so much time? Where does this expectation come from?
10 min		Question 2: What are your solutions and strategies for tackling workload?	Why (or how) do you think X might work? What might that look like in practice? Who could lead that?
10 min		Question 3: What are the solutions and strategies for tackling workload that work well in your department and/or school?	Who instigated X? How easy/hard was it to implement? What was the reaction from staff / those impacted? What was essential for the success of X?

10 min		Question 4: Are there any workload drivers in your school other than the ones we mentioned earlier, eg, NCEA, new initiatives etc?		
10 min		Question 5: What do you think should be done to tackle unnecessary workload – by government, by schools or by others?	How could X be done? What do you think the effect of X would be? What needs to happen for X to work?	
5 min		• Thank attendees for their time and valuable input which will help us better understand the workload issues they are facing. • This information will be used to inform advice to the Minister of Education at the end of the year. • Ask if they have any questions.		5 min

Roles in group

Facilitator: One person, nominated by NZPPTA or the Ministry
Notetaker: One person, not the facilitator – could be NZPPTA, the Ministry, or one of the other members of the group
Observers: Other members of the Technical or Working Groups

Responsibilities of each role

Facilitator:
• Leads the discussion, working through the five focus questions and asking any follow-up questions.

Notetaker:
• Takes written notes on behalf of the Working Group
• Makes sound recording to supplement the written notes, using voice recorder on smartphone or other device.
• Types up the notes after the discussion and circulates them to other attendees to get confirmation that it is a true reflection of discussions. Once finalised, circulate to Technical Group.

Observers:
• Can ask occasional follow-up questions to help better understand issues.

Appendix C: Review of Literature

The following is a brief high-level summary of research relating to teacher workload[83]. Further, more in-depth summaries can be found in the *Australian Council for Educational Research Secondary Teacher Workload Study 2004, The Elementary Teachers' Federation of Ontario (ETFO) Teacher Workload and Professionalism Study 2014* and the *NZPPTA Workload Taskforce Report 2016.*

Australian Council for Educational Research (ACER) Secondary Teacher Workload Study 2004

179. In 2004, as a result of negotiations on the Secondary Teachers' Collective Agreement, the Ministry commissioned the Australian Council for Educational Research (ACER) to undertake a study of the workload of teachers and middle leaders in New Zealand secondary schools to identify how it could be better managed.

180. ACER looked at relevant national and international research, held in-depth discussions with 20 schools, six of which subsequently became case studies and undertook a survey of all New Zealand secondary schools.

181. The main workload issue identified in the ACER 2005 study was finding longer, uninterrupted periods of time to complete professional duties outside the classroom. Around 75% of teachers felt that their workload was heavy with 52% feeling it was manageable, however 71% felt their workload was affecting the quality of their teaching[84].

Teaching and Learning International Survey (TALIS) 2013/14

182.   OECD's Teaching and Learning International Survey (TALIS) is conducted every five years, and surveys teachers who teach in Years 7 to 10. In 2013, over 100,000 teachers and 6,500 schools in 34 countries and economies took part in the second cycle. New Zealand participated in TALIS for the first time in 2014[85] and achieved a 90% response rate, with completed surveys received from 2,862 randomly selected teachers in 163 secondary, composite, intermediate and full primary schools.

183. The Working Group commissioned further analysis of the TALIS data focusing on teachers in state and state integrated secondary schools. A report was presented to the Technical Group summarising the teachers' responses to questions relevant to teacher workload.

184. Of these teachers[86], 87% were in permanent employment with 89% employed full-time (more than 0.9FTE) and the remainder part-time - 72% of those working part-time had chosen to do so.

185. The New Zealand TALIS data found high levels of job satisfaction and self-efficacy among secondary teachers. Between 80% and 95% agreed or strongly agreed with a range of job satisfaction statements, or reported that they could do a range of teaching competencies 'quite a bit' or 'a lot'. Overall job satisfaction was highest on average

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[83] Please note that it is a not an exhaustive list of research in this area.

[84] Page 47

[85] The main international report for the 2013 cycle of TALIS was published by the OECD in June 2014, before the New Zealand data was collected. Some subsequent OECD publications have included New Zealand data, and the Ministry of Education has published several Insights for Teachers briefs using New Zealand TALIS data. Details and links to all these publications can be found at: http://www.educationcounts.govt.nz/topics/research/talis

[86] New Zealand Year 7-10 teachers in state and state integrated secondary schools

among those professionals with five years or fewer teaching experience, compared with those who had been teaching between six and 20 years. By contrast, the least experienced teachers had a lower sense of self-efficacy on average than their more experienced colleagues. These patterns are similar to those observed on average internationally.

186. Teachers were asked about appraisal and feedback practices in their school. Three-quarters agreed or strongly agreed that measures to remedy any weaknesses in teaching are discussed with teachers, around a half agreed or strongly agreed that in their school a development or training plan is established to improve teachers' work, but only a third disagreed or strongly disagreed that teacher appraisal and feedback are largely done to fulfil administrative requirements. All these groups of teachers showed higher average scores on the TALIS job satisfaction scale than those who reported the reverse.

187. There was considerable variation in the frequency of engagement in a range of collaborative activities. Unsurprisingly, close to 100% of teachers said that they attended team meetings, with 54% reporting that they do so at least once a week. By contrast, while 57% responded that they observed other teachers' classes and provided feedback more than once a year, only 10% reported doing so at least once a month. Of particular note, the data highlights that teachers who collaborate and take part in collaborative professional learning more frequently, tend to have higher levels of self-efficacy and job satisfaction.

188. The next cycle of TALIS is scheduled to take place in late 2017 in southern hemisphere countries, and will provide trend information for much of the data collected in 2014.

The Elementary Teachers' Federation of Ontario (ETFO) Teacher Workload and Professionalism Study

189. The Elementary Teachers' Federation of Ontario (ETFO) Teacher Workload and Professionalism Study (2014) used a survey based on TALIS to gather information about teacher workload, professionalism, professional support, job and professional satisfaction and explored relationships between these and other related matters. They also undertook one-on-one interviews with teachers, principals, directors of education, and trustees, and a literature research on the effects of centralised school reform on teacher workload and professionalism.

190. The factors most frequently identified by interviewees as affecting a teacher's workload were planning, marking and assessment, communication with parents and extra-curricular activity participation. In addition, the number of students in a class, the range of their learning needs, and the number of identified special education students in the class were also perceived to affect teacher workload[87].

191. Respondents also identified factors that mitigated the impact that workload had on teachers and increased their satisfaction. These included:

- teacher professionalism
- school shared decision making
- a positive classroom disciplinary climate
- feelings of teaching efficacy
- a collaborative teaching environment.

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[87] Page 18 of Executive Summary
http://www.edu.gov.on.ca/eng/policyfunding/memos/nov2014/etfo_teacherworkloadexecsummary_en.pdf

192. They also noted that what administrators do affects teachers' perceptions of their work, their satisfaction, their collaboration with others and their sense of professionalism. This included; a clear school purpose, opportunities to work with other teachers, attention to the use of physical space, an understanding and recognition of what the teacher's daily work is including appreciation of stressors, active support for teachers and consulting with and listening to teachers, eg, with regards to PLD.

Secondary Schools in 2015: Findings from the NZCER national survey

193. The New Zealand Centre for Education Research (NZCER) undertakes research into secondary schools every three years – the first was undertaken in 2003. The most recent 2015 survey of a random sample of teachers and leaders from all 313 secondary schools in New Zealand, found that teachers as a group were feeling more positive about their work when compared with the previous survey, when they had the challenge of aligning NCEA and the NZ Curriculum (NZC).

    'Morale and enjoyment levels had lifted, and workload manageability showed some improvement......Most wanted to reduce the amount of paperwork and administration that they do and nearly half wanted to reduce their assessment workload.' (pg 83)

194. While NCEA no longer appeared to be the 'hot topic' as it had been in previous surveys, they found that the biggest issue facing teachers and principals was assessment.

Department of Education (England) Workload Challenge 2015

195. In October 2014, the Department of Education (England) launched their online Workload Challenge[88] which asked three open-ended questions about unnecessary or unproductive tasks that teachers carry out, what strategies work in their schools to manage these, and what more should be done by the Government, schools and others. They recognised that they needed to tackle the cause of workload pressures, not just the symptoms.

196. Over 44,000 people responded to the challenge and many noted that many of the tasks[89] carried out are not unnecessary or unproductive but are essential components of their job – it is the volume of these tasks, level of duplication, bureaucracy, detail and the way that they are carried out that can be unnecessary and unproductive and add considerably to the workload burden.

197. Respondents considered what tasks could be done differently to provide the biggest opportunity to reduce workload. The top five suggestions were:

    - recording, inputting, monitoring and analysing data (56%)
    - marking (53%)
    - lesson and weekly planning (38%)
    - administration and support tasks (37%)
    - attending staff meetings (26%).

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[88] Government response to the Workload Challenge, Department of Education, February 2015.
[89] Such as marking, planning and tracking pupil progress.

Alberta Teacher Workload Study, December 2015

198. The Alberta Teacher Workload Study was commissioned to better understand teachers' workload in Alberta, Canada. Almost 3,400 teachers, along with 357 administrators and 173 office staff, participated in the study which used both surveys and Time Use Diaries.

199. They found that although the majority of teachers (69%) and administrators (81%) were satisfied with their jobs, they were less satisfied with the:

- amount of time spent on work-related activities (34% teachers and 49% administrators)
- amount of time they had to collaborate with colleagues (32% teachers and 35% administrators)
- work-life balance (26% teachers and 30% administrators).

200. Ninety-one percent of teachers and 96% of administrators dissatisfied with work attributed this to workload, and the majority of both teachers and administrators noted that there had been an increase in workload (65% teachers and 62% administrators) compared with the previous year.

NZPPTA Workload Taskforce Report, April 2016

201. The NZPPTA executive established the Workload Taskforce in September 2014 to "investigate issues of workload intensification for secondary teachers." The taskforce, made up of members from key NZPPTA representative groups, considered the historical context of workload in New Zealand secondary schools, surveyed taskforce members and NZPPTA branches to obtain feedback on 'what makes up the secondary teaching job' and surveyed teachers and middle and senior managers to find out how long their spent on school work and what made up their day.

202. The outcomes of the Taskforce report are highlighted throughout this Report and form the basis for the selection of the seven areas of focus.

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Appendix E: List of Abbreviations & Acronyms

ACER	Australian Council for Educational Research
BYOD	Bring your own device
CoL	Communities of Learning | Kāhui Ako
Council	Education Council
ERO	Education Review Office
ERA	Employment Relations Authority
EOTC	Education outside the classroom
ETFO	Elementary Teachers' Federation of Ontario
HoD	Head of Department
Ministry	Ministry of Education
MNA	Managing National Assessment report
MoE	Ministry of Education
NCEA	National Certificate of Educational Achievement
NZCER	New Zealand Centre for Educational Research
NZPPTA	New Zealand Post Primary Teachers' Association
NZSPC	New Zealand Secondary Principals' Council
NZSTA	New Zealand School Trustees Association
NZQA	New Zealand Qualifications Authority
OECD	Organization for Economic Cooperation and Development
OFSTED	Office for Standards in Education
PCT	Provisionally Certificated Teacher
Pilot	Retention Pilot Programme for Māori Medium Beginning Teachers
PLD	Professional Learning and Development
PN	Principal's Nominee
SPANZ	Secondary Principals' Association New Zealand
STCA	Secondary Teachers' Collective Agreement
TALIS	Teaching and Learning International Survey
TAP	Transforming Assessment Praxis Programme
TOGA	Technical Oversight Group Assessment
Working Group	Secondary Teacher Workload Working Group