

# SCHOOL TRUSTEES BOOKLET

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Helping you ask the right questions

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School Trustees Booklet

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## Introduction

The Education Review Office (ERO) has written this booklet for boards of trustees. It is one of many tools available to help you in your role as a trustee. It focuses on student achievement and wellbeing, and the role the board plays in these two areas. The booklet includes questions and information that will guide you in your discussions with school leaders and as a trustee.

Boards of trustees have a stewardship role that involves planning for, and acting in, the interests of the school and its community. Student learning, wellbeing, achievement and progress are the board's main concern.

This booklet emphasises trustees' important role in asking about student achievement and ensuring improved outcomes for all students. It also includes a section on student wellbeing – ERO recognises that a safe learning environment also supports students' learning.

### **Updates to the Education Act 1989**

Some of the boards' roles and responsibilities around responding to student achievement and wellbeing may be changed under the proposed update of the Education Act.

Successful boards work in partnership with school leaders and staff for the benefit of students. Each have their respective roles and responsibilities but are dependent on working cooperatively with the other to be able to carry out their responsibilities effectively.

Good communication is an important part of being on a board. As trustees need to be able to talk to one another, share information, ask questions, and discuss important issues. In doing so, you develop relationships based on trust and work effectively together as a board.

## Where does ERO fit in?

The Education Review Office reviews all schools in New Zealand and publishes education reports on its website: [www.ero.govt.nz](http://www.ero.govt.nz)

As part of its review process, ERO looks at how effectively school governance contributes to student learning, wellbeing, achievement and progress.



## Trustees need information

A board's main responsibility is to ensure that all students at their school are achieving well. This includes making sure that the principal and staff are supported and resourced to achieve high-quality teaching and learning. To do this, trustees need reliable and detailed information from school leaders about the learning and wellbeing of children at their school.

As a trustee, this information will help you understand:

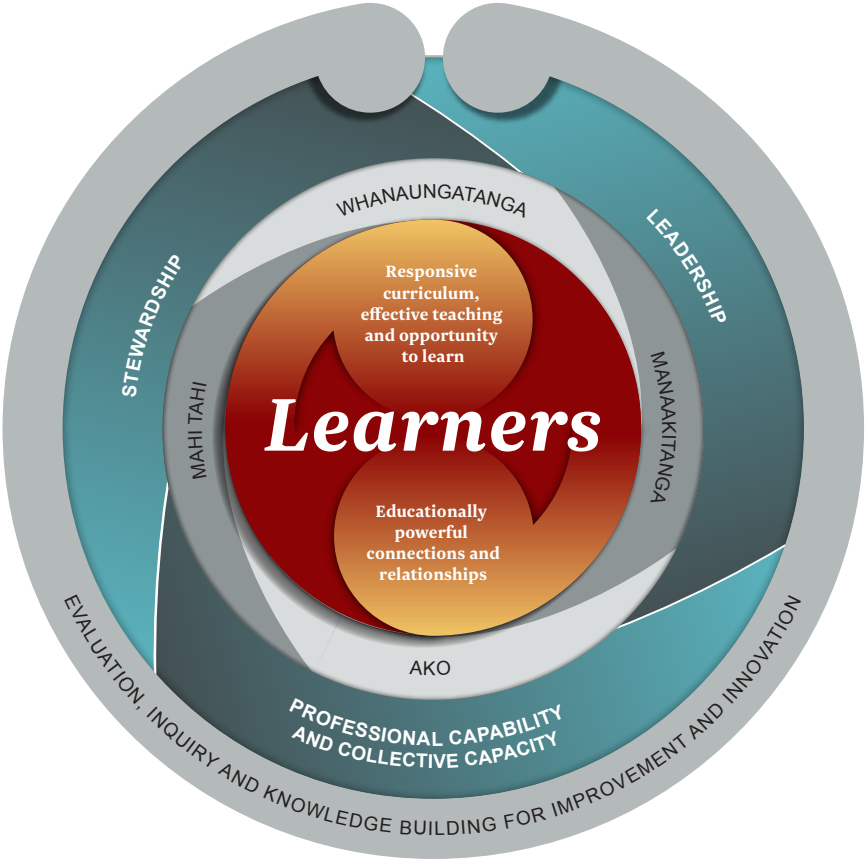
- > what is working and what is not
- > which groups of students have particular needs
- > what the school is doing to address those needs
- > if students are safe
- > if the curriculum suits all students
- > if the agreed outcomes are being achieved for all students
- > which groups of students are missing out
- > what resources are needed to teach effectively
- > where money needs to be spent.

## Trustees should ask questions

As a trustee, your role is to scrutinise information – *what's going on, does it make sense, what other information do I need?* If you do need more information to understand how well children at the school are achieving, ask the principal. Your focus on improving student outcomes should be explicit and relentless.



# School Evaluation Indicators: Effective Practice for Improvement and Learner Success





The School Evaluation Indicators focus schools on what matters most in improving student outcomes. The indicators are grouped under the six domains known to influence school effectiveness and student outcomes:

- > **Stewardship**
- > **Leadership of conditions for equity and excellence**
- > **Educationally powerful connections and relationships**
- > **Responsive curriculum, effective teaching and opportunity to learn**
- > **Professional capability and collective capacity**
- > **Evaluation, inquiry and knowledge building for improvement and innovation.**

### **Stewardship**

The stewardship domain is about the board's role. It includes indicators of successful stewardship and examples of effective practice.

The stewardship role of boards is about accountability and improvement. Stewardship emphasises the importance of trust based relationships and shared knowledge when representing and serving the community. The main task of a board of trustees is scrutiny (including self-scrutiny) – *'Are we doing the right thing here?'*

Visit [www.ero.govt.nz](http://www.ero.govt.nz) for more information about the School Evaluation Indicators.

# Questions about getting student achievement information

## What achievement information should the board get?

School leaders should regularly provide reports to the board on students' achievement and progress:

- > in relation to National Standards in literacy and numeracy (primary schools)
- > in other curriculum areas you want to focus on
- > for all age groups across the school
- > for Māori, Pacific, students with additional learning needs or special abilities, and those from other cultures
- > in national qualifications at secondary school level.

The reports should contain well-analysed data and comments explaining success and issues that need attention. Most importantly, it should be clear which groups of students are at risk of not achieving and how the principal and teachers intend to support these students to progress.

## How often should boards receive this information?

- > The board should receive regular achievement reports.
- > The frequency may depend on the nature of the information. The board and the principal may decide to focus on a learning area, or may agree to focus on different groups of students at each board meeting.
- > If the board is monitoring progress towards meeting targets it is likely to need more regular information to decide if extra resources are required.
- > If extra resources have been approved, you and the rest of the board need to know what has changed for students as a result of the spending.

## What counts as student achievement?

- > As well as *The New Zealand Curriculum* learning areas, parents and teachers value different types of achievement. These are often highlighted by boards in their charters.
- > As a board, you may prioritise areas such as sports, cultural activities, community service, activities that develop children's leadership potential etc.
- > You may want the principal to report on how many students are taking part in specific programmes. These reports should also tell you how well students achieved or made progress.

## Who can help trustees understand achievement reports?

- > The principal and senior staff can help you understand their reports on student achievement. Many trustees find it helpful if they are given achievement reports before meetings so they have enough time to read them and think about what the report means.
- > You can ask leaders and senior staff to give the board some professional development so you can better understand the assessment terms they use.
- > The New Zealand School Trustees Association (NZSTA) provides useful professional development for trustees through workshops, online modules, and facilitated individual board development and support plans. See [www.nzsta.org.nz/professional-development](http://www.nzsta.org.nz/professional-development)

## Questions about using student achievement information

### What should trustees do with student achievement information?

- > You will be asked to approve expenditure for resources and professional development that helps children learn and be safe. Student achievement information should be used to make these decisions.
- > You are expected to know how your school is supporting students who have additional learning needs, including gifted and talented students. The board is dependent on the principal and teachers to give it this information. As a trustee, it is part of your role to discuss and approve strategies to help these students.
- > You need to ask why leaders believe the proposed expenditure will improve teaching and learning. These reasons may be based on particular research, or previous experience with the resource or programme. The board needs to be sure that the money will be effectively spent on those children who need help the most.
- > If the board is asked to approve extra funding for teachers or teacher aides, you should ask about how this will allow more experienced classroom teachers to work with children needing additional support rather than the teacher aide.

### How do you know if the school's money was well spent?

- > The board should get a report about how well the funded resources worked. *What were the achievement levels before and after the new resource was used? Did the school accelerate the achievement of targeted students?*

## Questions about setting targets for student achievement

### Why have these children been chosen as a target group in the annual plan?

- > As a board you set and approve targets each year to raise student achievement. These are mostly for children who are not doing as well as they should in areas such as literacy or numeracy, or for those that will need extra help to achieve a National Certificate of Educational Achievement (NCEA) qualification.
- > You may also set targets for a group of very capable children who are able to achieve at an even higher level.
- > There may be a school-wide target to focus on a particular curriculum area.
- > If you are involved in a Community of Learning | Kāhui Ako you will be looking at how your school can contribute to the achievement challenges set by the Community of Learning | Kāhui Ako.

### How can trustees be involved in setting targets?

Three ways:

- > The board may receive a report from the principal with recommendations.
- > Trustees can use the student achievement information reports to identify areas or groups where achievement is a concern. You can refer to these reports and ask what is happening for these students and whether a target is needed.
- > In a Community of Learning | Kāhui Ako you would look at how improved learning at your school can contribute to improved achievement as children move through their learning pathways.

## How will I know whether the target groups are appropriate?

- > The board should be given achievement information that supports the principal's recommendations. The information should explain the reasons for the targets.
- > Targets should be achievable but should challenge both students and staff.
- > You should receive reports on progress towards meeting the targets (at least once a term) and at the end of the target period. You need the ongoing progress reports to check that the end of year target will be achieved.
- > You should ask whether, even with these targets, there are any children who need particular attention but who are still missing out.
- > You should ask whether any teachers will need professional learning and development (identified through their appraisal) to support the achievement of the target.



## Questions about partnership with parents, families and whānau

### How important is it that we find out parents' views about children's learning and wellbeing at school?

- > You should talk with parents, families and whānau about what they want for their children. They will help you to identify the priorities for your school's curriculum and future goals for the school's development.
- > You should engage parents and whānau in decisions that impact on the wellbeing of their children.
- > You should be particularly aware of, and seek, the aspirations of distinctive groups in your school community such as Māori, Pacific and groups from other cultures.
- > NZSTA and the Ministry of Education have developed resources, *Hautū – Māori cultural responsiveness self review tool for boards of trustees* and *Effective governance, Supporting Pasifika success* to support boards of trustees to meet their accountabilities by reviewing cultural responsiveness in their school.

### What information should we give our community about student achievement?

- > You should give your community information about student achievement patterns across the school. In primary and intermediate schools this would be specifically in literacy and numeracy in relation to the National Standards, but may also include other curriculum areas.
- > At secondary school you would report on NCEA results, but also achievement patterns for Years 9 and 10.
- > You will also need to report to Māori and Pacific families, as well as those from other cultures about the achievement of their children. In small schools you will need to be careful that individual students are not identifiable because of the small numbers.

## Do parents, whānau and families have enough opportunities to be active partners in their child's education at the school?

Parents should feel welcome to visit the school and take part in school activities. School reports should provide parents with information that clearly explains their child's progress, level of achievement and wellbeing. Parents should:

- > be encouraged to approach their child's teacher for further information on their progress
- > be supported to become active participants in setting their child's learning and social goals, in partnership with their child and the teacher
- > be shown ways they can support their child's learning
- > be provided with sufficient opportunities to express their views about the school.

The principal should give you information about the level of parent involvement in the school, such as attendance at parent group meetings, and parent help in the classroom and on school trips. The board may want to collect information about whether parents are satisfied about their relationship and involvement with the school, through written or telephone surveys, consultation meetings and other community events.

## What part do trustees play in making decisions about teachers' professional development?

- > Boards usually set a budget for teacher professional learning and development. During the development of the budget you can ask what the development priorities are.
- > Targeted, professional learning opportunities for teachers can help them improve their ability to raise student achievement. Professional learning and development should align with priorities identified in the board's annual plan. You can also see how the priorities are connected to the achievement information you have received during the year.



- > Often there will be some particularly skilful teachers in a school. Other staff members can benefit by drawing on their knowledge and experience. As a board, you may decide to help this by providing resourcing so that a teacher can be released from class to watch and learn from another teacher in action, either in your own or another school.
- > You may receive requests for additional funds for such things as conferences. Teachers and leaders should be able to explain how they think the conference will benefit students at the school. Such conferences often provide opportunities for teachers and leaders to share ideas with, and learn from, their colleagues in other schools.
- > You should receive feedback about the impacts on teaching or student achievement from any courses or conferences the board has funded.

## How should trustees monitor the principal's performance and progress with improving student achievement?

- > As trustees you are responsible for making sure that the principal's performance is appraised each year. You may contract an outside consultant to do this.
- > The appraiser will report back to you, in committee, as to how well the principal has achieved their goals for the year. This can be done in writing as a full report or as a summary of the appraisal report, as per the board's appraisal policy.
- > You should have input into the goals that are set as part of the principal's performance agreement. These should link to the board's goals and will probably include goals to raise student achievement. Approved achievement targets should be included in this performance agreement.
- > The board's policies should include information about the principal's right to speak to the appraisal report. It should also be clear that the board is able to hold discussions about the principal's employment, or anything related to it, including the appraisal report, without the principal being present.

## Are trustees responsible for using student achievement information to set performance goals for teachers?

- > The principal is responsible for ensuring all staff are appraised. They should report to you when appraisals have been completed for the year. You should receive general feedback about school-wide teaching successes and next steps.
- > Some schools include aspects of strategic and annual goals and student achievement targets into individual teachers' goals. They then report to trustees on the outcomes of these for teachers as a whole.



## Questions about achievement for secondary students

Does the board need to know about achievement at all secondary year levels?

- > You should receive achievement reports for all year levels, including Years 9 and 10.
- > You should expect reports about the progress and learning of all students. This includes information about particular groups such as Māori and Pacific, students with additional learning needs and special abilities, and students from different cultures.
- > You should also receive information about international students and students in attached units such as alternative education, activity centres, service and trades academies, and teen parent units (if you have such students at your school).



## What information should the board get about achievement in NCEA?

- > You should receive a report on the NCEA results that includes:
  - how many students got NCEA Levels 1, 2 and 3, and University Entrance
  - the numbers of students who met the literacy and numeracy requirements at NCEA Levels 1 and 2
  - the achievement in individual NCEA subjects
  - achievement broken down according to gender
  - the achievement of Māori, Pacific and students from other cultures in all of the above.

## What should I be aware of when interpreting NCEA data?

- > You need to be clear if the figures you receive relate to all the students who enrolled for a course at the start of the year, or only to those who actually sat the examination. If the report shows only the latter then achievement levels can appear more favourable.
- > Numbers of students in senior school subjects can be small so a change in results for one student can have a significant effect on the achievement percentages.

## Should the board know about students who leave school before they achieve national qualifications?

- > You should receive information about the numbers of students who leave school without formal qualifications. This information should be broken down into groups of learners, including Māori, Pacific and other cultures.
- > A significant drop-off in the numbers attending between years 9 and 12 may indicate that the school's curriculum is not meeting the needs of groups of students. You should then focus on this area.

## Would it be useful for trustees to know what happens to our students after they leave school?

- > You should get information about how many students went on to further education or employment. This information should again be broken down for groups of learners, including Māori, Pacific and other cultures. You should be concerned if many students are leaving school with no employment or future education plans.

## Does the board help shape the school's curriculum?

- > The board, through the principal and staff, must develop and implement a school's curriculum.
- > The *New Zealand Curriculum* sets the direction and provides a framework from which your school can develop its own curriculum. As a trustee, you agree on the learning priorities for the children at your school and make sure that the curriculum continues to meet the children's needs.

## What role do trustees have in planning the long-term direction of the school?

- > The board is responsible for setting the school's strategic direction.
- > As a trustee, you have an important role in identifying the key goals that the board can work towards. The principal and staff will advise you about actions that will help to achieve these goals.
- > The decisions that you make about resourcing and improving teaching will help support this ongoing improvement.

## What role do trustees have when the school is part of a Community of Learning|Kāhui Ako?

- > NZSTA offers advice to boards that are considering joining a Community of Learning|Kāhui Ako to help them make an informed decision. You can find it in their section on *Investing in Educational Success (IES)*.

## Questions about student wellbeing

### Why is student wellbeing important?

Boards have a legal responsibility to consider, promote, balance and respond to all aspects of the student, including their physical, social, emotional, academic and spiritual needs. These considerations require deliberate expression and action across all curriculum areas, pastoral care, strategic priorities and teaching practices.

### What part do trustees play in ensuring student wellbeing?

Ensuring student wellbeing is part of the board's stewardship role.

You can, through the principal and teachers:

- > actively seek students' perspectives about wellbeing
- > ensure the school's vision and values reflect the strengths and potential of students, teachers, parents and whānau
- > connect with parents of the most vulnerable children when reviewing the school's vision and values
- > focus on improving wellbeing of all students, particularly those who are at risk of poor wellbeing outcomes.

To effectively meet the board's statutory requirements you should have well-defined processes and procedures for dealing with and reviewing traumatic experiences and critical incidents in the school.

### How can we improve student wellbeing at our school?

As a board, you can review the effectiveness of wellbeing policies, procedures and practices in place by asking and responding to questions such as:

- > *What priority, as a school, do we place on promoting the wellbeing of our students?*
- > *What are the key problems facing our students?*
- > *How meaningful are the ways we determine the effectiveness of pastoral care, and do they include student and parent/whānau voice and links to teacher appraisal?*

- > *Do we have a set of agreed goals and targets based on school data, that emphasise student wellbeing, to guide all actions, reviews and improvements so that all young people can be, and continue to be, 'confident, connected, actively involved lifelong learners'.*

The board can use self-review tools developed by NZCER to explore how they can contribute to creating a safe and caring climate that deters bullying and the extent to which school practices are inclusive of all students.

Visit [www.wellbeingatschool.org.nz](http://www.wellbeingatschool.org.nz)



## The Vulnerable Children Act 2014 – what it means for boards of trustees

The Vulnerable Children Act 2014 introduces new requirements for organisations funded by state services that employ or contract people to work with children. This includes boards of trustees.

The requirements are all about keeping our children safe through mandatory safety checking for all paid staff in the state-funded children's workforce. Some people won't be allowed to work with children because of their previous convictions.

It is the board's responsibility to ensure safety checking is carried out. The board can delegate this role to an agreed person.

The board must have a written child protection policy in use that says how suspected neglect and abuse will be identified and reported.

The Ministry of Education has a *VCA Guide for schools* to help navigate the requirements of the Act. Go to [www.education.govt.nz](http://www.education.govt.nz) under Running a School.

The New Zealand School Trustees Association has detailed information about a board's requirements under the VCA. Go to [www.nzsta.org.nz](http://www.nzsta.org.nz) under Employer Role.



## What sort of information should the board receive about attendance, stand-downs and suspensions?

- > You will get information on patterns of attendance, and the numbers of standdowns and suspensions. There should be a comparison of your school's data with the national norms and expectations for your type of school.
- > These figures should be further broken down for Māori, Pacific, year level, gender and other cultures to check that your school is doing well for these students.
- > You should be kept informed about the impact of initiatives to improve attendance or reduce stand-downs and suspensions.
- > You may want to set targets in relation to improving attendance and reducing standdowns and suspensions.

## What sort of information should the board receive about bullying?

- > Your school should have a policy regarding student safety, both physical and emotional, and procedures regarding bullying.
- > Schools investigate bullying in different ways. Some conduct regular (at least annually) anonymous student surveys on the amount of bullying and report the outcomes to the board.
- > As a board, you should also receive reports containing information on trends and patterns, and indicating the number of bullying incidents handled.
- > Serious bullying incidents may be discussed fully by the board, in committee, as part of disciplinary procedures.
- > You should expect reports about how effective anti-bullying programmes have been.

## Should the board receive any information about complaints made against staff or children?

- > Your school should have a readily accessible complaints policy and/or procedures that clearly outline channels for communication.
- > The principal would not normally report the details of day-to-day complaints to trustees unless they require a board decision, or impact on board policy, such as a complaint about a suspension. You may receive reports on the numbers of complaints received and whether they were resolved.
- > You should be informed about any complaint made against a teacher that is likely to result in disciplinary action. This would be discussed in committee.
- > If a complainant is unhappy with the way the principal handled the complaint, they can raise their concerns with the board. If you are approached by a parent who has a complaint, check with them that they have first followed the procedures laid out in the school's complaints policy/procedure.

## Planning for improvement

### How should the board respond to the issues raised in ERO's last report?

- > You should help decide how the school will respond to matters highlighted by ERO.
- > When areas for development are identified, the board has a role in ensuring the necessary improvements are made.
- > You should also expect regular reports on how these changes are improving student achievement.



