

# Strategic Intentions

2015-2019



*Presented to the House of Representatives pursuant to Section 39 of the Public Finance Act 1989*



Our evaluation insights are a catalyst for change so that every child achieves success as a lifelong learner.

---

# CONTENTS

<b>Foreword from the Minister of Education</b>	<b>1</b>
<b>Overview from the Chief Review Officer</b>	<b>2</b>
ERO's purpose and whakataukī	2
ERO and the system	3
<b>Introduction to the Education Review Office</b>	<b>4</b>
Nature and scope of ERO's operations	4
ERO's role in the education system	4
<b>Strategic Intentions 2015-19</b>	<b>6</b>
The challenge for ERO and the sector	6
Sector and Government priorities	6
ERO's strategic approach and imperatives	8
School Evaluation Indicators: Effective Practice for Improvement and Learner Success	9
The learner at the centre	10
The learner and their parents and whānau	10
The learner and the profession	11
Communities of learning	11
ERO's focus in 2015/16	12
Embedding the new effective practice indicators in both external and internal evaluation processes for schools	13
Improving the practice of internal review across the system	14
Using evaluation to support Investing in Educational Success	14
Developing a new methodology for Ngā Kura-ā-Iwi (and indicators for kura and wharekura); and revising our approach to Māori medium education in mainstream settings	15
Enhancing engagement with parents and whānau in their children's learning	15
Implementing a new methodology for home-based education and care services in the early childhood sector	16
Supporting improvements to quality in early childhood services	16
Summary of appropriations, outputs and performance measures	17
How ERO monitors its own performance	19
Sustainability and future delivery	19
Strategic success	19
Operational success	19
<b>Organisational capability and people</b>	<b>20</b>
Introduction	20
Challenges and future shift	20
Professional learning and development (PLD)	20
ERO's culture	21
Change leadership	21
Equal employment opportunities	21
Relationship with the Public Service Association	21

---

Published 2015

©Crown copyright

*Except for the Education Review Office's logo, this copyright work is licensed under Creative Commons Attribution 3.0 New Zealand licence. In essence, you are free to copy, distribute and adapt the work, as long as you attribute the work to the Education Review Office and abide by the other licence terms. In your attribution, use the wording 'Education Review Office, not the Education Review Office logo or the New Zealand Government logo.*

ISSN: 1175-8295





# Foreword from the Minister of Education

---

The Government is committed to lifting educational achievement for all young New Zealanders. A successful education is the key to every child thriving – meeting their full potential intellectually, socially, emotionally, physically and culturally.

The Education Review Office plays a critical role in helping the government to ensure that the education system increasingly contributes to the social and cultural wellbeing of our young people and to the nation's economic prosperity and growth. I expect to see ERO working in the pursuit of equity and excellence, both at a system level and with every early childhood education service and school.

The quality of teaching and leadership are the most important in-school factors in equipping our students to be successful at home and abroad. This needs to be matched with strong family involvement and high community expectations.

So, ERO has a fundamental role in helping to:

- understand the levers for increasing equity in increasingly devolved education systems
- create learning environments that address the needs of all children and young people, and
- provide feedback to schools and families about how they can make a real difference to the learning outcomes for their children.

ERO's revised ***School Evaluation Indicators: Effective Practice for Improvement and Learner Success*** provides boards, principals and teachers with strong guidance about what they need to do to achieve equity and excellence.

The new guidance is a good example of how ERO is looking to strengthen its own capacity to provide high quality evaluation advice, and promote further improvement within our education system.

I am satisfied that the information on strategic intentions prepared by the Education Review Office is consistent with the policies and performance expectations of the Government.

**Hon Hekia Parata**  
Minister of Education

June 2015



# Overview from the Chief Review Officer

---

## ERO's purpose and whakataukī

ERO's purpose is guided by and closely aligns with its whakataukī:

### OUR PURPOSE

*"Our evaluation insights are a catalyst for change so that every child achieves success as a lifelong learner."*

### OUR WHAKATAUKĪ

*Ko te tamaiti te Pūtake o te kaupapa:*

*The child – the heart of the matter*

---

The Education Review Office (ERO) occupies a privileged place in the education system. On any one day we have about 160 reviewers in schools and early childhood services, accessing information, sitting in classrooms, and meeting with boards, principals, teachers, students and parents. Our education system works well for most learners, but less well for some. Achieving equity and excellence is the greatest challenge for us all.

ERO has reviewed the evaluation indicators for schools. We have drawn from analysis and synthesis of research and evaluation findings to develop *School Evaluation Indicators: Effective Practice for Improvement and Learner Success*. These indicators focus on what matters most in improving outcomes for all students - the achievement of equity and excellence.

From July 2016 the *School Evaluation Indicators* will form the basis of internal review by school leaders and ERO's complementary evaluations with schools. The indicators describe the learning outcomes being sought and the dimensions of practice essential to achieving these. In doing so, they highlight the importance of educationally powerful connections and relationships between school, parents and whānau.

We expect the indicators will become the common descriptor of excellence – they will be the steel thread of quality of performance through the system.

ERO's work programme includes developing ways to improve how we communicate with parents and whānau so that they can engage more effectively about their child's learning.

The Government is investing in creating modern learning environments. ERO is charged with developing thinking about modern learning practice – the pedagogy required to make the most of the technology. We will describe modern learning practice in a way that parents and whānau can recognise and understand.

The OECD has been very positive about ERO's focus on complementary evaluation. Schools and early childhood services assess their own performance before ERO undertakes an external evaluation. A productive, constructive engagement intended to improve performance can then take place. ERO and the Ministry of Education are jointly working on a new tool to build internal evaluation capability. This is intended to be a practical guide that will enable all schools to review their own performance, identify what is not working, what needs to change and how.

In the next few years we will provide more information and insight to help schools improve their performance. We will find ways to create and share digestible, informative material that gives boards and leaders the optimism and courage to make the important changes that will result in better outcomes for all children.

---

## ERO and the system

ERO works with others to influence early childhood and school leaders and teachers, trustees and parents. Without concerted effort we will be unable to achieve the levels of equity and excellence that are needed if New Zealand is to thrive in the 21st century.

We will continue to build effective working relationships with the Ministry of Education and other government agencies, as well as with schools, early childhood services, parents and whānau. Achieving equity and excellence for all cannot be achieved by any single agency, or any part of the system on its own.

There is a lot of jargon in the education sector. In fact there are multiple languages and the more that can be done to create a common language the better. To address this, ERO will take a lead in the development and dissemination of a glossary of modern learning practice.

ERO's approach includes placing a stronger emphasis on learner pathways, looking at how the system works for children from zero to 18 years of age. Over the next few years we will refresh our review methodologies and processes to reflect the importance of learner pathways and transitions.

ERO is working closely with the Ministry of Education to develop an evaluation resource for schools. This resource will complement the *School Evaluation Indicators* and will give schools guidance about how to use evaluation for improvement.

In summary, ERO's key strategic initiatives to improve the performance of the system over the planning period include:

- embedding the new *School Evaluation Indicators* in both external and internal evaluation processes for schools
- improving internal evaluation practice across the system and revising our approach to external review of schools
- using evaluation to support the Investing in Educational Success initiative
- developing a new methodology for Ngā Kura-ā-Iwi and revising our approach to Māori medium education in mainstream settings
- enhancing engagement with parents, family and whānau in their children's learning
- implementing a new methodology for home-based education and care services in the early childhood sector
- supporting improvements to quality in early childhood services
- reviewing our indicators and methodology for early childhood services with reference to new research and developments in the sector, and
- developing a new approach to reviewing hospital-based early childhood services.

In signing this document, I acknowledge that I am responsible for the information on strategic intentions for the Education Review Office. This information has been prepared in accordance with sections 38 and 40 of the Public Finance Act 1989.



**Iona Holsted**  
Chief Review Officer

June 2015



# Introduction to the Education Review Office

---

## Nature and scope of ERO's operations

The Education Review Office (ERO) is a government department established in October 1989 under the State Sector Act 1988. The Chief Executive of ERO is the Chief Review Officer.

Under Part 28 of the Education Act 1989, ERO is required to review the performance of pre-tertiary education providers in relation to the educational services they provide. Review Officers are statutory officers designated under the Act. They exercise powers of entry, investigation and reporting.

At the system level, ERO carries out national evaluations of education sector performance and policy implementation, and reports to the Minister about practice in the pre-tertiary sector.

In summary ERO's core activity includes:

- **National Evaluations** – on system-level issues including sector performance, policy implementation and pre-tertiary educational practice
- **Education Reviews** – scheduled external evaluation reviews carried out with schools and early childhood services to complement and strengthen their own internal evaluation processes
- **Special Reviews** – carried out where a matter needs to be reviewed and reported outside regular reviews
- **New School Assurance Reviews** – carried out to provide assurance to new school boards and their communities that the school has undertaken suitable administration processes and curriculum preparation
- **Private School Reviews** – carried out under section 35I and Part 28 of the Education Act 1989
- **Homeschooling Reviews** – reviews of programmes for students exempt from enrolment at a registered school, undertaken in the context of section 21 and Part 28 of the Education Act 1989 and usually at the request of the Ministry of Education
- **Communities of Schools Reports** – as part of the sector's Investing in Educational Success Initiative, including tailored reports for each community, bespoke reports for schools receiving the Principal Recruitment Allowance, and national reports on trends and issues.

---

## ERO's role in the education system

ERO has a guardianship and improvement role in New Zealand's education system. Our mandate recognises that ERO works with other agencies to achieve equity and excellence across the system and for all learners. As New Zealand's external education evaluation agency, ERO's work complements the internal evaluation activities of schools and early childhood services.

Features of ERO's current evaluation approach include:

- a focus on the achievement of all learners, especially those who are at risk of poor outcomes
- an integrated approach to external evaluation and internal evaluation, with a participatory, collaborative and dialogue-based approach to the evaluation process
- a context-specific approach to evaluation design, data-gathering, analysis and synthesis, and the communication of findings
- an emphasis on evaluation as a learning process, building knowledge at the school and system levels, especially about the conditions necessary for effective practice to flourish
- strong advocacy and a focus on achieving equity and excellence.

ERO is committed to honouring Te Tiriti o Waitangi as the founding document of Aotearoa New Zealand underpinning relationships between Māori and the Crown. ERO's internal strategy, *He Toa Takitini: Accelerating Outcomes for Māori 2013-2017* reaffirms this commitment and presents ERO's response to the Government's Māori education strategy *Ka Hikitia* and is a call to intensified action.



ERO is also committed to promoting the achievement and success of Pacific students in the New Zealand schooling system. ERO's *Pacific Strategy 2013-2017* outlines this commitment and is our response to the *Pasifika Education Plan 2013-2017*.

There is growing evidence about what matters most in supporting and promoting excellence and equity for diverse learners, in particular, Māori and Pacific learners. School and classroom practices that improve outcomes for Māori learners are also likely to improve outcomes for all learners.

Improved collaboration within and between education communities is essential to enhance continuity of learning for all students.

From 2015 ERO will produce Communities of Schools reports to give an overview of how well schools in each community are performing based on the key findings in their recent reports. It will also produce bespoke reports for schools in receipt of the Principal Recruitment Allowance to provide evaluative insights as a basis for future improvement.

Over time ERO will develop further evaluative processes to inform and support the Investing in Educational Success initiative, including national reporting on emerging trends and issues.



# Strategic Intentions 2015-19

---

## The challenge for ERO and the sector

New Zealand's education system is well regarded internationally. Education participation and achievement of National Standards and NCEA Level 2 qualifications are rising overall. Many students excel.

However, there are disparities in New Zealand's education system. While many of our children and young people achieve well, there are others who are less well served by our system. And despite different approaches and interventions over the years, these disparities persist.

This is the challenge facing the education sector. As a system, we need a collective response in which we all work towards improving outcomes for all learners.

ERO works alongside the Ministry of Education (the Ministry) and other members of the Education Sector Stewardship Board to achieve higher and more equitable levels of participation, engagement and achievement. There is a collective determination that the system needs to improve the outcomes for all children and young people. This represents a real opportunity for ERO to do things differently – to be more flexible, responsive, efficient and effective.

ERO is developing its approach around the need for:

- **better tailoring** – responsive evaluation services which drive improvement and help to raise the outcomes for all children and students
- **better targeting** – of investment in the learning and development of its people and its critical evaluation resources
- **more effective collaboration** – at all levels to raise achievement
- **better, more relevant pathways** – through the education system and beyond into the workplace and society
- **more evidence-based decision-making** – by students, parents, teachers, leaders, providers and government.

ERO has built up a wealth of knowledge about what works in schools and early childhood services, and the key areas of the system that need to be targeted for improvement. We have reported often that schools and services with high levels of achievement exhibit three common traits. Irrespective of other variables they all have:

- leaders who are committed to continuous improvement
- effective processes which are focused on the needs of the learner
- constructive and effective engagement with family and whānau.

ERO is developing the resources and capability to ensure that its accumulated knowledge and expertise has an increasingly positive impact in early childhood services, schools and communities.

---

## Sector and Government priorities

The Government's Better Public Services targets for the education sector focus on participation and student achievement. They are to:

- increase participation in early childhood education to 98 percent by 2016
- increase the proportion of 18-year-olds with NCEA Level 2 or an equivalent qualification to 85 percent by 2017
- increase the proportion of 25 to 34-year-olds with advanced trade qualifications, diplomas and degrees (Level 4 or above on the New Zealand Qualifications Framework) to 55 percent by 2017.

ERO contributes to these priorities through its influence on how schools and early childhood services perform. ERO identifies what works, establishes indicators for success, and uses its evidence to influence change in individual parts of the system, as well as the system as a whole.





The priorities outlined for the sector, as they relate to early childhood education and schooling are to:

- **implement Investing in Educational Success (IES):** maintaining momentum on the design and implementation of IES
- **improve continuity of learning, transitions and student-centred pathways:** from early learning to schooling to tertiary education, further training and employment, including for Māori medium education
- **champion 21st century practice in teaching and learning:** integrating digital technology into teaching and learning; and modernising the approach to professional learning and development
- **strengthen inclusion:** improving the operation of special education provision, and providing more in-class support
- **review the Education Act**
- **review the funding systems for early childhood and schooling.**

ERO's focus is on the first four priorities and on actively supporting sector initiatives within its available resources and sphere of activity.

ERO continues to explore new ways of working. It is envisaged that the important changes that ERO will make over the planning period will be consistent with the excellence horizon described in the Performance Improvement Framework (PIF) Report. The 2012 report recommended that ERO should aim to:

- identify all the effects critical for better overall performance of the entire education system
- develop a professional practice organisational operating model to underpin ERO's core strategies to consistently lift school/early childhood education service performance, and
- make greater use of its analysis and information to shape the thinking about future policy and operational strategy.

In response to these recommendations ERO has appointed an Executive Leadership Team member with specific responsibility for professional practice, and is reviewing its operating model to sharpen its review processes and focus its national evaluations on system performance.

## ERO's strategic approach and imperatives

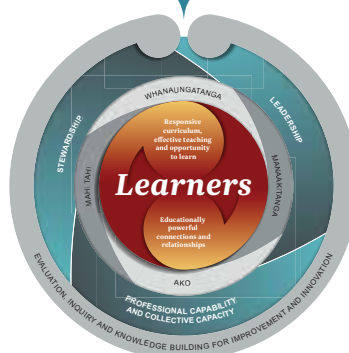
ERO's work is driven by the need to achieve equity and excellence. This is reflected in our purpose and whakataukī.

Currently, ERO's education reports are aimed at parents and families to inform them about the quality of schools and early childhood services. ERO's reviews and face-to-face engagement with trustees, leaders, and teachers provide a key point of influence. These are rich and challenging conversations which will increasingly enable trustees, leaders and teachers to adapt their practice to become more effective in their roles.

### Equity and excellence

#### Our purpose

Our evaluation insights are a catalyst for change so that every child achieves success as a lifelong learner.



#### Our whakataukī

*Ko te Tamaiti te Pūtake o te Kaupapa*  
The Child – the Heart of the Matter

ERO recognises the need to ensure the quality of its own work. The learner is front and centre of everything we do and this is reinforced through our priorities. In relation to the needs of our audience and the sector's priorities, ERO will:

- consider how it can provide more targeted and bespoke approaches to reviews to meet the needs of the system as a whole, and students in particular
- develop new approaches to reviews that are less focused on schools and more focused on the child's experience through their learning pathway
- ensure that face-to-face engagement with trustees, leaders and teachers is of a consistently high professional standard because this is the point at which ERO has the greatest impact
- consider how it can best connect with parents and whānau so that they are empowered to demand high-quality education for their children
- provide the sector with clear definitions of quality so that there is a consistent understanding of what effective learning in the 21st century looks like
- increase knowledge of ERO's impact on system results.

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

In May 2015 ERO released the new indicators document:

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

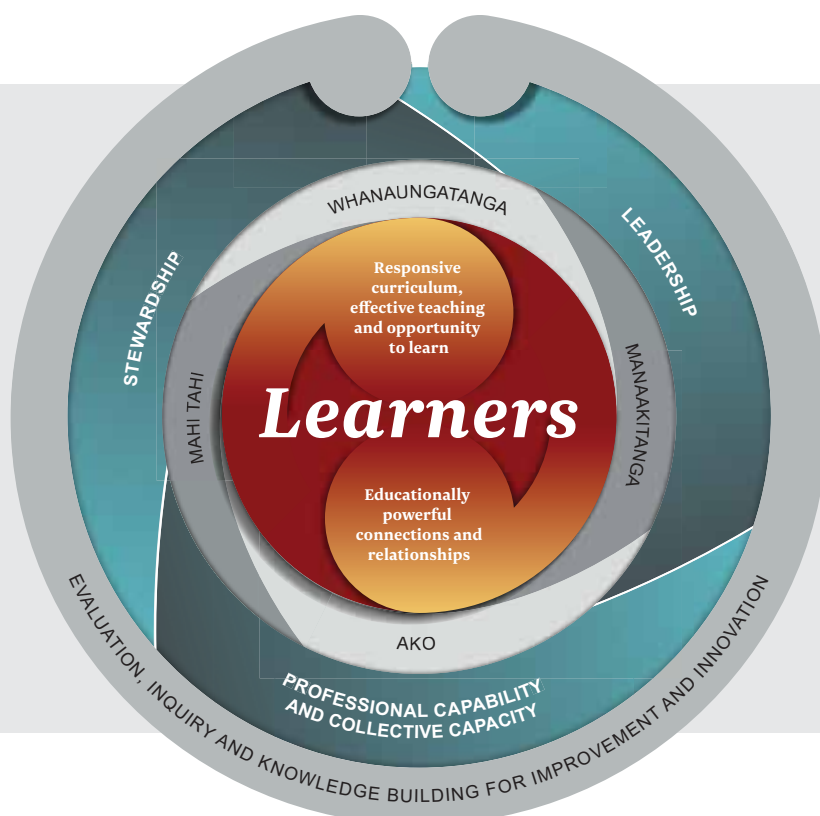
This revision of the effective practice indicators reflects a deepening understanding of how schools improve learning outcomes for all children and young people and explores the role of evaluation in that improvement process.

ERO first introduced evaluation indicators in 2003. These were revised in 2010. ERO recognises that the evaluation indicators and supporting material will evolve and change over time in the light of new research and evaluation findings.

The new indicators will be used by ERO's review officers and schools in both external and internal evaluation activities. The principles that have guided the design of the indicators framework and the selection of indicators are:

- they focus on the valued outcomes for diverse (all) students articulated in New Zealand curriculum documents
- they concern what matters most in education provision that promotes equity and excellence
- they are underpinned by a research-based theory of improvement
- they reflect the interconnectedness of the organisational conditions required to promote and sustain continuous improvement and innovation
- they signal a shift to an evaluation orientation that uses deep professional expertise and engagement
- they are observable or measurable
- they require rich data from a range of sources for effective decision making.

The release of the *School Evaluation Indicators* represents a significant opportunity for the New Zealand education system to refocus on what matters most in improving the performance of schools and learning outcomes for all our students.





---

## The learner at the centre

At all levels within the education system key processes must be configured around the needs of the learner. Educators and leaders in schools must know where their students have come from, how they learn, what interests them, what they have achieved and how the curriculum can be shaped around them. ERO's focus for 2015 to 2019 includes:

- continuing to place learner achievement and success at the heart of the education review process
- developing new approaches to working with parents to improve their understanding of the learning outcomes they should be demanding
- building on prior work on inclusion of special needs learners with an emphasis on the effectiveness of targeted support
- developing and implementing a methodology for reviews of Ngā Kura-ā-Iwi
- revising our approach to Māori medium in mainstream settings.

---

## The learner and their parents and whānau

Given the very strong and essential connection between parents and whānau and their children's learning, ERO will focus on:

- working with trustees, leaders and teachers to identify how they engage and involve parents and whānau in learning and teaching for their children, and how they use parents' views to inform their decision-making
- giving parents and whānau information about modern learning practice and what they should expect for their child
- reporting in a clear and unambiguous way to build parent and whānau understanding, and to increase their demand for high-quality educational outcomes.



---

## The learner and the profession

Technology is pervasive in business and in private lives. Our classrooms are catching up and while the use of technology is very important for student achievement so too is the extent to which the profession adopts adaptive practices that represent 21st century modern learning practice.

A significant project for ERO will be to define, disseminate and maintain a glossary of modern learning practice. Key deliverables will include collaboratively developed documentation to support shared understandings, including:

- definitions of key terms
- examples of teaching that are characteristic of modern learning practice
- examples of learner and learning behaviours in a modern learning environment
- highlighting innovative practice.

ERO's work programme from July 2015 will also include supporting the Education Council of Aotearoa New Zealand (EDUCANZ), the new independent statutory professional body for teachers and education leaders.

---

## Communities of learning

The education system needs to ensure a seamless learning pathway from early childhood through to tertiary education with the learner at the centre of this experience. Collaboration focused on the learner's needs will improve achievement outcomes for all. ERO's work programme for 2015 to 2019 includes:

- designing evaluation processes to support communities of learning – with a focus on building their capacity to determine robust achievement challenges
- providing evaluative information to support schools eligible for the Principal Recruitment Allowance
- encouraging the participation of early childhood services in communities of learning.



---

## ERO's focus in 2015/16

In 2015/16 ERO will finalise the design principles for its new operating model so that we adopt a comprehensive, coherent approach to achieving our purpose – one that links the critical design elements in relation to process, technology, and people capability. The design principles will be used to assess current processes, practice and policy. Any changes will be reflected in the next iteration of our Four-Year Plan.

The State Services Commission is planning a learner-centric Education System Performance Improvement Framework (PIF) review in 2015/16. The focus will be on the system working better to improve learner outcomes and pathways. ERO will play an active part in the process.

ERO is also looking at the scope and scale of its national evaluations. This is to ensure that they focus on those areas that need the greatest attention in a way that provides the most robust information to effect change.



---

## Embedding the new effective practice indicators in both external and internal evaluation processes for schools

The new *School Evaluation Indicators: Effective Practice for Improvement and Learner Success* will be used by schools for internal evaluation and by ERO for external evaluation. The learner focused outcome indicators are organised in terms of the vision of *The New Zealand Curriculum* and *Te Marautanga o Aotearoa*:

*“Young people who are confident, connected, actively engaged, life-long learners”.*

The process indicators are organised in terms of the key domains that influence school effectiveness and student outcomes from schooling:

- 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.

In each domain, evaluation indicators, drawn from the research evidence linked to outcomes, are identified and illustrated by examples of effective practice. In using the indicators, evaluators and educators will need to draw on rich sources of qualitative and quantitative data to support evaluative thinking, reasoning, processes and decisions.

We will pilot the new indicators with volunteer schools in 2015 and we will introduce them to the wider education sector. We will seek feedback before formally adopting and using the revised indicators from mid 2016. From this point we will use them to provide external evaluation about schools' progress and performance.

---

## Improving the practice of internal review across the system

Effective internal review enables school trustees, leaders and teachers to identify the strengths and weaknesses of current performance and what they need to do better to improve the achievement of their learners.

ERO has worked with the Ministry of Education to develop a school evaluation resource. ERO will also publish school case studies that exemplify effective practice and its relationship to improved outcomes.

The availability of ever-improving data from the Ministry of Education provides the opportunity to more clearly identify areas of greatest need. This information enables ERO to be more flexible and efficient in its approach.

---

## Using evaluation to support Investing in Educational Success

ERO's strategic imperatives have a strong focus on the learner as part of a community of learning. This imperative is a driver for the evaluation work ERO will do to support the policy initiative Investing in Educational Success (IES).

Communities of Schools (CoS) are the cornerstone of the IES initiative and ERO is contributing to this work by:

- providing contextual reports for use in the development of achievement challenges
- offering workshops to build a community's capacity to evaluate its effectiveness
- collecting information at a national level which will help inform the development of future CoS
- identifying and sharing effective collaborative practices.

ERO will support schools approved to offer the Principal Recruitment Allowance by:

- writing a summary report that details the performance areas to be addressed and the actions undertaken
- maintaining a liaison role with the board and principal
- determining the most appropriate timing for the next review.

While the detailed policy for IES is still being worked through, ERO anticipates that in the medium to long term there will be implications for individual school reviews.

Over time, it is expected that all schools and early childhood services will form part of a learning community. ERO will use its data and knowledge to identify regions where there is persistent poor performance across many schools and work with the Ministry of Education and others to identify supports or interventions that will raise the performance across the board.



---

## Developing a new methodology for Ngā Kura-ā-Iwi (and indicators for kura and wharekura); and revising our approach to Māori medium education in mainstream settings

ERO is focused on providing high quality evaluation for Māori medium education settings. ERO has begun initial discussions with Ngā Kura-ā-Iwi about the development of a culturally responsive evaluation methodology and indicators.

ERO is also considering a new approach to its reviews of Māori medium education in mainstream settings.

In developing methodologies for the Māori medium sector we acknowledge that both partners bring different and equally comprehensive knowledge and alternative perspectives, and share a common goal that tamariki are the focus of the work.

ERO also acknowledges key immersion evaluation features should include:

- evaluation principles that demonstrate acknowledgement of te reo Māori, tikanga Māori and the developmental nature of the immersion education setting
- a review process explicitly including the marae protocol of encounter, ongoing dialogue, value of korero - kanohi ki te kanohi
- the inclusion of a representative from the governing/parent body as a part of the review process
- the value of building internal evaluation capability for Māori.

These methodologies will be developed by Māori, for Māori and with Māori and will focus on successful outcomes for Māori.

---

## Enhancing engagement with parents and whānau in their children's learning

The evaluation indicators highlight the critical involvement of parents and whānau in student achievement. Through our review processes ERO will focus on how effectively schools are developing relationships with families and, in particular, those families who have been traditionally less engaged in education.

ERO will identify and share more successful strategies and good practice. To support this process, project work will aim to improve engagement with parents and whānau and better integrate their voice into ERO's reports and feedback to schools.

ERO will provide increasingly useful and clear information that helps parents and whānau navigate the education system and voice their aspirations so they can better support the learning process.

Parents and whānau are not all the same. ERO's review processes will respond to the needs of all learners, taking into account the differences and diversity in society.

This diversity is particularly evident in Auckland and we recognise the opportunities and challenges this presents to the education sector. We will undertake a series of evaluative studies focusing on how the sector is responding to issues such as language and cultural diversity, residential mobility and migration in our largest city. This will support sector efforts to achieve equity and excellence.

---

## Implementing a new methodology for home-based education and care services in the early childhood sector

The home-based early childhood service sector has experienced rapid growth. To support improved performance and accountability, ERO has recently developed and published a draft revised methodology for reviewing home-based early childhood education and care services.

The new methodology reflects a collaborative effort between ERO, representatives from the home-based early childhood sector, and researchers with an interest in home-based education and care.

The revised methodology was trialled in some home-based services scheduled for review in 2014 and a consultation draft was published for use in 2015. ERO will finalise and publish the methodology by the end of 2015.



---

## Supporting improvements to quality in early childhood services

One of the Government's Better Public Services targets for the education sector is to increase participation in early childhood education to 98 percent by 2016.

The sector has already seen increased participation; in 2014 approximately 96 percent of children starting school had attended early childhood education.

There has been a significant increase in the number of licensed services, and equally, a demand for higher quality education and care in recent years.

It is recognised that participation in high quality early childhood education is fundamental to achievement in later years. However, ERO's work in the early childhood sector has highlighted considerable variability in the quality of curriculum implementation, assessment and evaluation in early childhood services.

ERO recently investigated how well services were supporting children as they approach transition to school. This evaluation highlights the need for greater understanding in the early childhood sector of curriculum (both *Te Whāriki* and *The New Zealand Curriculum*) and the need to bridge children's learning as they transition between these two settings.

ERO will maintain its national evaluation programme and publish further reports on the quality of aspects of early childhood education. In addition we will, over time, review our evaluation indicators and methodology in alignment with future developments in the sector.

## Summary of appropriations, outputs and performance measures

The table below summarises ERO's appropriations for output expenses and capital expenditure for 2014/15 (budget and forecast) and 2015/16.

ERO is a small department (with a baseline of under \$30 million) which works to influence other parts of the education system in the pursuit of improved learning outcomes. It prioritises its effort based on where it will achieve the best result for children and young people within its allocated funding.

2014/15 Budgeted \$000	2014/15 Estimated \$000	Total appropriations	2015/16 Budget \$000
		<b>Early Childhood Education Services</b>	
9,987	9,987	ERO achieves improvements in teaching and learning practices by assisting early childhood education service providers to improve their capacity in self review, governance and leadership through independent reviews	9,550
		<b>Schools and other education service providers</b>	
14,718	14,718	ERO achieves improvements in teaching and learning practices by assisting schools and other education service providers to improve their capacity in self review, governance and leadership through independent reviews	15,081
		<b>Quality of education reports and services</b>	
3,915	3,915	ERO improves student achievement by influencing and informing on the development and implementation of education policy and practices through its system-wide evaluations	3,149
		<b>Education Review Office - Capital expenditure</b>	
1,461	1,461	This appropriation is limited to the purchase or development of assets by and for the use of the Education Review Office, as authorised by section 24(1) of the Public Finance Act 1989.	1,500
30,081	30,081	<b>Total annual and permanent appropriations</b>	29,280

The total appropriation for Vote ERO is projected to decrease from \$30.1 million in 2014/15 to \$29.3m in 2015/16. This is mainly due to the completion in 2014/15 of a four-year programme to carry out additional reviews of schools.

In addition to Crown revenue, ERO receives payment for contract-based services to third parties and generates a small amount of revenue from rent recoveries. The level of revenue for contractual services is expected to be lower in 2015/16 than 2014/15.

The four-year forward baseline forecast remains at about \$29m per year until 2018/19. The table on the following page summarises ERO's outputs and performance with indicative targets for the coming year.

In recent times ERO has undertaken about 1,300 - 1,400 reviews of early childhood services and 710 - 840 reviews of schools each year. On average, ERO has reviewed each school or early childhood service once every three years.

The budgeted range for the number of reviews of schools and early childhood services in 2015/16 has been reduced slightly from previous years to allow resources to be devoted to developing and delivering reports for the new Communities of Schools.

In addition to its reviews of early childhood services and schools ERO has undertaken up to 20 national evaluation reviews each year. These are designed to provide the wider system with the ambition and tools to improve learning outcomes. Most national evaluations take a year or more to complete.

2014/15 Budgeted Standard	Education Review Office Performance Measures	2015/16 Budget Standard
	<b>National Evaluation Services</b>	
<b>Up to 20</b>	Number of education evaluation reports	<b>Up to 20</b>
<b>100%</b>	Education evaluation reports are consistent with approved presentational standards and agreed terms of reference	<b>100%</b>
<b>80%-100%</b>	Sample studies of key government audiences confirm evaluation reports are used to inform policy and/or to establish priorities for the sector	<b>80%-100%</b>
<b>80%-100%</b>	Sample studies of schools and early childhood services that report use of education evaluation reports to inform and improve their own practice	<b>80%-100%</b>
	<b>Early Childhood Education Services</b>	
<b>1,300-1,460</b>	Number of early childhood education services reviews	<b>1,200-1,460</b>
<b>90%-100%</b>	ERO uses a moderation panel to assess levels of compliance with approved standard procedures for a sample of education review reports of early childhood education services	<b>90%-100%</b>
<b>80%, 90% and 98% respectively</b>	Percentages of unconfirmed (near final) reports sent to early childhood education services for confirmation of accuracy and comment will meet target for reporting to the Minister within 20, 25 and 35 working days of the end of the last week on site	<b>80%, 90% and 98% respectively</b>
<b>80%</b>	Proportion of early childhood services evaluated that will have used its review and evaluation process to make improvements	<b>80%</b>
<b>Establish baseline</b>	% of early childhood services evaluated previously within the 2 year review cycle moving to the 3 year review cycle	<b>Establish baseline</b>
	<b>Schools and other education service providers</b>	
<b>710-840</b>	Number of state schools education reviews	<b>650-840</b>
<b>Up to 35</b>	Number of homeschooling education reviews	<b>Up to 35</b>
<b>15-25</b>	Number of private school education reviews	<b>Up to 25</b>
<b>90-100%</b>	ERO uses a moderation panel to assess levels of compliance with approved standard procedures for a sample of education review reports of schools and other education service providers	<b>90-100%</b>
<b>80%, 90% and 98% respectively</b>	Percentages of unconfirmed (near final) reports sent to schools and other education service providers for confirmation of accuracy and comment will meet target for reporting to the Minister within 20, 25 and 35 working days of the end of the last week on site	<b>80%, 90% and 98% respectively</b>
<b>80%</b>	Proportion of schools evaluated that will have used its review and evaluation process to make improvements	<b>80%</b>
<b>60%-65%</b>	% of schools evaluated previously on the 1-2 year review cycle moving to the 3 year review cycle	<b>60%-65%</b>
<b>12%-15%</b>	% of schools evaluated previously on the 3 year review cycle moving to the 4-5 year review cycle	<b>12%-15%</b>
	- Number of Communities of Schools reports	<b>Up to 100</b>
	- Communities of Schools' reports are consistent with approved presentational standards and agreed terms of reference	<b>100%</b>
<b>70%</b>	Level of public satisfaction with ERO's Services (Kiwis Count)	<b>70%</b>



**NOTE:** ERO introduced a new methodology for early childhood services in May 2013 including four new differentiated return times. The return time ranges are:

- **very well placed** – the next ERO review in four years
- **well placed** – the next ERO review in three years
- **not well placed** – the next ERO review within two years
- **needs development** – the next ERO review in consultation with the Ministry of Education.

---

## How ERO monitors its own performance

To assess the quality of its school and early childhood service reviews ERO will continue to use a moderation panel. The panel looks at a representative sample of reviews each year and looks at the levels of compliance against internal standard procedures, and the timeliness and consistency of EROs reporting. This exercise also informs ongoing improvement in our processes.

To assess effectiveness, ERO will continue to undertake surveys to determine the extent to which schools and early childhood services have used external and internal evaluation processes to make improvements.

In addition ERO monitors its review return times, assessing the extent that schools and early childhood services have progressed to a new cycle – signalling that schools and early childhood services have improved their own practice.

ERO also uses the *Kiwis Count* survey to assess the level of public awareness of, and satisfaction with, ERO's work (national evaluations and institution reviews). The survey is carried out by the State Services Commission.

---

## Sustainability and future delivery

ERO's insights influence change in local learning environments and at system level. ERO needs to develop its own understanding about how it can best inform the improvements needed and better respond where the system is not achieving equity and excellence.

The wider economic and social costs of a system that is neither equitable, nor excellent, are significant. The following is a brief summary of the way in which ERO can reduce system risk and look to sustain its efforts to improve outcomes in the long term.

---

## Strategic success

ERO's future sustainability will be determined by the extent to which all its people remain committed to its purpose statement and whakataukī. ERO's future effectiveness will be largely based on its ability to work within and across the system to support improved learning outcomes for all. This is a good challenge.

ERO aims to develop a profession of highly skilled evaluators, fully equipped for the challenges of the role in the 21st Century. This means its review officers will have the right mix of knowledge and skills, work in a highly supportive environment and have access to modern tools and resources.

---

## Operational success

ERO's operational success rests, in part, on its ability to influence the sector to achieve equity and excellence into the 21st century. The release of the *School Evaluation Indicators* represents an important step in the transition for ERO and the sector.

The 2015 review of ERO's operating model will identify options to deliver on the new sector priorities while also providing a basis for managing operational risk.

The availability of ever-improving data from the sector provides the opportunity to more clearly identify where the greatest need for intervention lies. ERO's current information systems, including information and communications technology, will not support the medium-term changes it wishes to make. ERO will examine how it can improve the way that information is generated, digitise our data, and share information across the system.

ERO's ongoing success and sustainability requires that it makes even better use of its resources. In the next few years ERO's reputation will be enhanced by the extent to which it is able to be more flexible, responsive, efficient and effective.



# Organisational capability and people

---

## Introduction

ERO will develop its *People Strategy* in 2015/16 in tandem with its professional practice operating model. It is envisaged that the new model will assist ERO to develop the capability needed to deliver better results within baseline. The *People Strategy* will:

- describe how ERO will ensure that its people have the skills and experience necessary to be increasingly effective in their roles, including their ability to review modern learning practice in modern learning environments
- confirm that ERO's operating model can be appropriately resourced
- ensure that planned outputs can be delivered to the expected standards of quality and timeliness.

---

## Challenges and future shift

To support the sector's new approach and ERO's desire to influence change, its *People Strategy* will evolve to support professional, adaptive evaluative practice. Alongside the methodology and project work underway, we will increasingly analyse the practice skills required for each review, and use our people more flexibly to support improved outcomes for learners.

ERO's review officers carry out their work in a manner that encourages schools and teachers to put the learner at the centre and to address the needs of those students at high risk of poor education outcomes.

Over the coming years it will be critical for ERO to recruit and/or upskill its staff in the following areas:

- review and evaluation capability
- quality of face-to-face interaction
- credibility around technology
- confidence with concepts of modern learning practice.

ERO has highly skilled people but a significant number could potentially retire in the next four years. Over 50 percent of ERO's review officers are aged 60 or older. This represents a significant risk, creating a potential knowledge gap if a number of people with considerable experience and expertise leave within a short timeframe.

---

## Professional learning and development (PLD)

Maintaining a leadership role in professional evaluative practice is an important contribution to ERO's influence and reputation. Over the next four years, ERO's PLD programme will be informed by the *Professional Evaluation Practice Strategy*, to be developed in 2015/16. This will build on ERO's current competency model, and reframe professional expectations for highly skilled evaluators.

ERO will continue to engage with the international evaluation community to share evaluation frameworks and approaches, to seek feedback on our evaluation practice and professional expectations, and to inform future development of our evaluation capability.

As well as building professional evaluation capability, ERO's PLD programme is designed to keep people up-to-date with developments in education including modern teaching practice, assessment, curriculum, and management in schools and early childhood education.

*He Toa Takitini*, ERO's strategy for Māori success, articulates the programmes, initiatives, and resources aimed specifically at improving capacity for improving outcomes for Māori. The strategy was refreshed in 2013 to align more closely with *Ka Hikitia*.

ERO's *Pacific Strategy* also contributes to the wider education sector's commitment to accelerating Pacific success. The strategy describes how ERO is building the capacity to promote Pacific success in the system.

During 2015/16 ERO will build its own organisational understanding and ability to respond to modern teaching practice. A specialist internal project team has been established that will contribute to and develop a shared understanding of best practice, build internal capability, and lead forthcoming evaluation project work.

---

## ERO's culture

ERO has and will maintain a culture that is consistent with a government department and professional organisation. As most ERO people are out in schools and early childhood services every day, their professionalism is essential to maintaining ERO's credibility. Without this, ERO will not be effective at influencing change. Any instances of poor performance in the field are dealt with promptly.

ERO's people are highly engaged and motivated to make a difference for the achievement of children. ERO's whakataukī – *Ko te Tamaiti te Pūtake o te Kaupapa: the Child the Heart of the Matter* – has guided its work for 25 years and is a strongly held belief.

Successive culture surveys have shown that ERO's people are highly committed and connected to ERO's purpose. They generally have a high opinion of the professionalism and work of their colleagues and enjoy the level of teamwork their roles provide. This provides a strong basis for making the changes needed in the coming years.

---

## Change leadership

Our organisational leaders are well placed to lead and implement very important change initiatives. In addition to improvement to review methodology and practice there are long established processes within ERO that will be challenged and changed. Greater clarity in roles, especially for those with overall responsibility for reviews, will support the change process.

The drive to improve learning outcomes for all children and young people, especially those for whom the system has not served well, is very evident within ERO. There is also a real desire for successful organisational change – and the elements needed for such change are not in short supply.

---

## Equal employment opportunities

In line with the New Zealand Public Service Equal Employment Opportunities Policy, ERO strives to:

- treat people fairly and with respect, ensuring equality of access to opportunities (equality)
- understand, appreciate and realise the benefits of individual differences (diversity).

ERO remains committed to integrating equality and diversity into all aspects of its business and has reflected this in its ongoing work plans. The Te Uepū ā-Motu hui (for all staff with Māori descent) and Moana Pasefika forum (for staff with Pacific descent) are examples of ERO's commitment to equal employment opportunities.

### Relationship with the Public Service Association

ERO and the PSA continue to meet regularly at national and local levels as part of the Working Relationship Agreement. Both parties find these meetings useful.



***Ko te Tamaiti te Pūtake o te Kaupapa***

*The Child – the Heart of the Matter*

[www.ero.govt.nz](http://www.ero.govt.nz)