

THE EFFECTS FOR MÄORI
OF BULK FUNDING
A literature review

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New Zealand Council for Educational Research



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EXECUTIVE SUMMARY

This report was commissioned by Te Puni Kokiri in late 1998, to provide an analysis of the impact for Māori of bulk funding of schools. The views expressed here are those of the authors and do not necessarily reflect the views of Te Puni Kokiri.

Bulk funding was a contentious policy which took various forms through the 1990s. In 1999, bulk funding policy provided a voluntary option, offering some schools additional funding, and somewhat more flexibility in their use of staff. With the change of government, bulk funding is set to come to an end at the start of 2001.

The report consists of two parts, first, a description of bulk funding and the impact of education decentralisation for Māori, and then an analysis of what mandatory bulk funding might mean for Māori.

Part 1 describes:

- the rationale for bulk funding, which had its origins in the decentralisation of education administration to individual school level which began in 1989 with *Tomorrow's Schools*,
- the reasons for widespread opposition within the education sector,
- the various forms it has taken and the evidence of its impact in schools,
- Māori opposition to bulk funding, and
- evidence about the impact for Māori of decentralisation of education administration.

Some of the main points which emerge through the description and analysis are:

- Little analysis was done in the policy development of the likely benefits and cost to Māori students, and the schools most likely to serve them, particularly high-Māori-enrolment schools, or Māori medium schools.
- Nor was there much attention paid in the research on the impact of various bulk-funding options and trials to Māori students specifically, or analysis of school responses in terms of their Māori enrolment.
- Unlike bulk funding in England, or of early childhood education and tertiary education in New Zealand, bulk funding of schools in New Zealand since decentralisation has remained voluntary, and offered increased funding rather than capped or average-salary based funding.
- Bulk funded schools have used their additional resourcing to increase the size of their teaching staff, provide additional programmes for students or increase professional development for staff, improve resources, or buildings.
- Bulk funded schools were more likely to employ beginning or unqualified teachers, on limited term contracts.
- Bulk funding was most attractive to intermediate and composite schools, and larger schools. It was no more attractive to kura kaupapa Māori and high Māori enrolment schools than others.
- Māori organisations opposed bulk funding because it did not represent real partnership, would continue to underfund Māori students and educators, allow the government to withdraw from responsibility, and did not address key issues for Māori education.
- Decentralisation of education administration and funding to the individual school level has shown no gains for Māori students. Education participation and achievement gaps remain. Growing competition between individual schools has resulted in roll losses and instability for high Māori enrolment schools, making it more difficult for them to serve their Māori students.

- High Māori enrolment schools do make more of an effort to meet Māori student needs than others. A critical mass of Māori students in a school seems necessary to bring about change.
- Bulk funding does not address some of the fundamental issues which lie behind Māori under-achievement, and the obstacles to (re)create distinctively Māori educational provision of high quality. These obstacles include a continuing lack of well-qualified Māori teachers, particularly for Māori medium education, and a lack of appropriate curriculum and assessment resources.

It is therefore unlikely that bulk funding on its own would provide the means to lift educational provision for Māori sufficiently to close the achievement gap for Māori.

To lift educational provision, attention needs to be paid to the infrastructure needed by schools, the role of central support, the role of external support (possibly through clusters) and the ways in which schools improve.

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BULK FUNDING— ITS POTENTIAL EFFECTS FOR MÄORI

This review draws together information and research on the policy option of including teacher salaries within schools' operational grants, commonly known in New Zealand as "bulk funding". While analysis has been done of the impact of this policy on schools in general – some based on empirical data, some extrapolating from similar policies operating elsewhere – no analysis had been done of what the policy might mean for Mäori.

The study was commissioned at the end of 1998. It focuses on the bulk funding policy as it was in early-mid 1999. The Labour government which was elected in November 1999 has signalled that the bulk funding policy will be phased out by 2001.

The main aims of the study were to:

- gauge the benefits and risks for Mäori of this policy option, in Mäori medium and English medium schools.
- gauge the potential impact of this policy option on the reduction of the disparities between Mäori and non-Mäori in compulsory education; and
- gauge the potential impact of this policy option on the development of distinctively Mäori compulsory education.

Before we can make this analysis, we need first to lay the ground by describing the history of the policy and its different forms, education sector responses, information about the impact of the four kinds of bulk funding tried in New Zealand schools, the issues identified by Mäori in relation to bulk funding, and relevant material from the last decade on educational institutions' responsiveness to Mäori, and Mäori educational achievement and participation.

The review starts by outlining the history of bulk funding, the various forms it has taken, and the issues identified by the education sector as a whole in relation to bulk funding.

The report then turns to the evaluations of the impact at school level of the different forms which bulk funding policy has taken between 1992 and early 1999. While there has been some analysis of the impact on Mäori of the wider shift to school self-management, there are few direct data on schools serving Mäori students and communities in the analyses of the impact of different forms of bulk funding.

Bulk funding is one element in the decentralisation of education administration to schools (often called "school self-management") which began in 1989 with the implementation of the Tomorrow's Schools policy. This report goes on to describe research findings for the period since 1989 to March 1999 on trends in Mäori school achievement, school responsiveness to Mäori, and provision for Mäori.

Issues identified for Mäori, by Mäori educators, are then described.

The conclusions bring together relevant material from each of the sections to arrive at an analysis of the likely benefits and risks of bulk funding, as it was in early 1999, for Mäori students, teachers, school trustees, whanau, and communities.

1. BACKGROUND—POLICY DEVELOPMENT AND RESPONSES 1988–1999

Timeline

- 1988 Inclusion of teacher salaries recommended by the Picot report (1988), and included in the Tomorrow's Schools policy framework.
- 1990–91 Background policy papers prepared setting out rationale. Sector opposition. Government support limited to a self-selected trial over three years.
- 1992–95 *Teacher Salaries Grant trial (TSG)*
Formula: Schools funded by roll numbers generating funding amount, at the equivalent of the average salary for teachers and for management positions. Payments quarterly in advance.
Formula advantaged schools where teachers were all or mostly well below the average salary rate, e.g., those employing young or inexperienced teachers, or teachers with few qualifications, or those with high teacher turnover.
Seventy schools opted for this, including four kura kaupapa Māori.
- 1993 *Salaries Grant for Management (SGM)*
Formula: Funding for management positions banked directly into school bank accounts 4-weekly in advance, at the actual salary of those in management positions.
Mandatory introduction for all schools.
- 1996–98 *Directly Resourced schools (DRS)*
Formula: Teacher salaries, at the average rate, banked 4-weekly in advance. Schools could return to central resourcing for teacher salaries after three years.
By May 1998, 13 percent of all schools¹ had chosen this option.
- 1998–2000 *Fully Funded schools*
Formula: Teacher salaries paid at the top of the range for secondary and area schools; for primary schools, at a rate based on the average of each qualification group weighted by the number of teachers in each group nationwide. The rate is reviewed each year. Money is paid to schools 4-weekly in advance.
Schools also have the option of switching back to central resourcing after three years.
At 2 March 1999, 27 percent of schools had chosen this option. Take-up rates were highest for intermediate and area schools. Rates for secondary schools were higher than for primary school. Take-up rates did not differ in relation to school decile and the proportion of Māori students at a school, and were much the same for kura kaupapa Māori (25 percent) as for all schools. Thus the fully-funded option did not appear to be more attractive to Māori-centred schools, or schools serving most Māori students.

¹ No breakdown of school characteristics is available.

Initial Bulk-funding Policy and Rationale

The policy option of including teacher salaries within schools' operational grants was part of the Picot report (Taskforce to review education administration, 1988) which laid the basis for the decentralisation of education administration to individual schools which began in 1989. The Picot report recommended that individual learning institutions be "the basic unit of education administration" (ibid, p. xi) because at this level people would have "the strongest direct interest in the educational outcomes and the best information about local circumstances" (ibid). Such decentralisation was to take place within a framework of local objectives set within national objectives, for which institutions would be held accountable.

Bulk funding was included in the policy framework which followed Tomorrow's Schools. A number of working parties of government officials and education sector representatives were set up to put flesh on the bones of the policy framework. The funding working party was split on how teacher salaries should be included in schools' operational funding. The majority favoured their inclusion at actual cost; a minority, including Treasury, favoured a formula which was based on average teacher costs.

In addition, it was clear that the work involved was too complex to be concluded in time to implement any change by the start of 1990, when operational grants first went to schools. Political pressure was already high due to principal and trustee concerns about the formulas used in estimating the operating funding for individual schools, and the adequacy of the amounts they would receive.

There was also concern that the impact on schools could be inequitable, with negative impacts on schools serving low-income students, especially Māori students, who had been singled out among the intended beneficiaries of the decentralisation reforms.

In 1990, the name for this inclusion was "bulk funding". The main rationale for the policy (Ministry of Education Project Team, 1990) was sourced in the overall emphasis in government policy on school self-management. In terms of self-management, schools did not have authority to decide their teaching numbers, nor change their staffing structure by themselves; on the other side of the self-managing coin, schools were not bearing the full costs of their staffing decisions:

There exists no requirement for boards of trustees to ensure efficient or economic deployment decisions in appointing teachers and in the setting of salary levels. (Ministry of Education Project Team, 1990, p. 9)

Another rationale for bulk funding was the existence of a number of targeted staffing schemes which gave additional staffing over and above staffing entitlements to some schools, but not others. The schools which gained additional staffing (resourcing in "kind" rather than cash) were mostly those serving particular groups of students deemed to have additional needs, including Māori. Additional staffing schemes also existed which continued salary funding for a limited time for schools with declining or fluctuating rolls.

However, although these differences between schools existed, total salary bills for schools with similar staff profiles were in fact similar because of the "aging" profile of New Zealand's teaching profession.

. . . the majority of teachers are located at the top of salary ranges. This situation does mean that differentials between schools employing the same profile of staff are less significant . . . If a direct funding approach was to be adopted, any formulae to determine teacher salaries would require teachers to be costed at the upper ends of the salary scale. (Ministry of Education Project Team, 1990, p. 10).

It also suggested that boards' ability to make efficient or economic staffing decisions was dependent on a move away from collective employment contracts, nationally negotiated.

Bulk funding of salaries would make little sense if boards are bound tightly by award agreements setting out staff levels, salaries etc, over which they have no control. (p. 27)

The report also noted that it was more difficult for small schools to get a balance of inexperienced (cheaper) and experienced staff, and that schools with high staff turnover also had higher appointment costs to bear than other schools.

While it mentioned "loser" schools, and the need to introduce bulk funding gradually over a period of time to minimise any losses, no formula was recommended, and (therefore) no analysis provided of the likely characteristics of "loser" schools.

Sector Opposition

The two teacher unions opposed the introduction of bulk funding. School trustees were also opposed, and initial support from their national organisation, NZSTA, caused an outcry (Ballantyne 1997, pp. 66-67). Only nine percent² of the primary school trustees in a 1990 national survey of primary schools conducted by the New Zealand Council for Educational Research (NZCER) supported bulk funding, with another 11 percent unsure. Māori trustees were more concerned than non-Māori about the likelihood that the policy would increase inequality between schools (Wylie, 1991, pp. 66-67).

Analysis of "Winners" and "Losers" under Bulk Funding

In 1991, further policy papers developed options for formulas, and canvassed the school sector for its views on the option it would find most acceptable.³ One of these papers noted that bulk funding paid at average teacher salary rates made more sense in larger schools, which had more frequent staff turnover (Ministry of Education, 1991, p. 35). These schools were more likely to be able to achieve the balance of experienced and inexperienced teaching staff that was assumed in a bulk-funding formula which staffed schools on an overall average. The paper was concerned that a number of schools, particularly small schools, would show a "divergence" from this balance, or averaging, and therefore recommended "indirect" bulk funding rather than actual cash funding paid directly to schools. Loser schools were those which would have to use their operational grant to make up staff costs. No analysis was made of the likely characteristics of these loser schools, e.g., the proportion of Māori enrolment in the school.

It was also noted that loser schools should be able to use their operational funding to make up staff costs, but that there were risks, including potential bankruptcy.

Provisions would have to be made for dealing with such situations, either by retaining a proportion of the salary funding, or insisting that schools participate in some sort of insurance scheme to cover the contingency of bankruptcy. (Ministry of Education, 1991, p. 42)

This paper also noted that the school sector generally opposed the policy in principle. Of the options presented, the sector was least opposed to the staffing first, cashless, indirectly funded

² Twenty-eight trustees from 310 trustees responding, from 202 schools.

³ Te Runanga Matua was included in the consultation; their response could not be tracked in the time available for this study.

option. This option calculated funding for each school this way:
student numbers decide staffing profile which decides school funding,
rather than the “funding first” model which follows this order:
student numbers decide funding which decides staffing profile.

The staffing first option resembles the current centrally funded option (in contrast to the “fully funded” option), in which teachers are paid centrally, with no cash going into school accounts. This option remains the preference for most schools, with 73 percent remaining centrally funded as at 2 March 1999.

Because primary staffing was done in “steps”, this paper recommended that staffing schedules should change to relate student numbers more directly to staffing before bulk funding was introduced. This anticipates the staffing schedule changes made on the basis of the Ministerial Reference Group (MRG) recommendations in 1995.

Deloitte Ross Tohmatsu’s review (1991) of the Ministry of Education’s 1991 report noted that in fact these formulas would reduce staff expenditure below current government budget estimates.

Thomson (1991) queried the need for change, noting that “the bulk funding system is such that all schools would be likely, at some stage, to face funding shortfalls” (p. 5). He noted that “The variability that is currently taken account of by cross-subsidisation between schools would, under bulk funding, have to be absorbed within schools”, leading to “higher staff turnover, a greater number of part-time staff, volatile staff/student ratios and greater variability in class sizes” (p. 5).

Teacher Salaries Grant Trial

In response to persistent sector opposition, Cabinet did not support mandatory bulk funding (Butterworth & Butterworth 1998, pp. 182–184). Instead, a limited trial was announced of a Teacher Salaries Grant (TSG). This began in 1992, for a three-year period which was extended until 1995. This option was taken by 70 schools, of which all but four would gain more money. The four “loser” schools⁴ were all given funding to make up for identified losses (at 200 percent of their first-year loss over the period of the trial).

Salaries Grant for Management

In the meantime, an increased proportion of teacher salaries had been included in schools’ operating grants, particularly through the Salaries Grant for Management (SGM), which covered the actual salaries of principals and senior staff.⁵ This was seen as a covert move towards bulk funding by the teacher unions (‘Ballot to ban bulk funding’, NZEI Rourou, 30/11/1992, p. 1).

In 1995, a new staffing schedule was introduced to take effect in 1996. This followed work of the Ministerial Reference Group (MRG), a cross-sector group including teacher unions. Among other changes, including increased funding for Māori-immersion programmes, the funding for the SGM was increased and distanced from actual individuals by paying the top of the range of rates and qualification groups for management positions. For schools opting to stay with central funding of teacher salaries at their actual level, the SGM was paid 4-weekly to the school board. Other teachers continued to be paid directly by central government.

⁴ Their characteristics are not included in publicly available material.

⁵ No information is available about the ethnicity of the teachers and principals whose salaries were affected. Setting the bulk funding rate at the top of the salary scale may have allowed schools to pay higher rates for hard-to-fill positions, such as HOD, Māori. A bulk funding rate based on averages would not have allowed the same flexibility to attract scarce staff.

Directly Resourced Schools

Schools opting to receive teacher salaries with their operational grant also received all money 4-weekly in their bank accounts, hence the name Directly Resourced Schools (DRS). These schools were not bound by orders-in-council regarding staffing. This meant that a school could decide its staffing numbers, and composition, e.g., it could reduce the number of management positions. In primary schools, principal salaries were calculated at the top of the grade, and other positions by the average of each grade for senior positions, or the average of all basic teacher salaries. In secondary schools, principals were paid at the top of their range appropriate to the school grade, senior management positions by the rate for the position and school grade, and others, by the “average global rate”. DRS schools also got a “compensatory factor” of 1.5 percent to cover salary adjustments such as higher duties allowance which were not built into individual rates. DRS schools could also request a return to central funding after three years.⁶ By May 1998, 13 percent of all schools had taken the DRS option, including most of the schools which had taken part in the TSG trial.

Bulk-funding Issues Identified by the Education Sector

However, a national survey of all school boards belonging to NZSTA (around 90 percent of all schools) in 1997 showed that most schools remained opposed to the inclusion of teacher salaries in school operating grants (Wylie, 1997a, p. 15). Both primary and secondary trustees feared additional workloads from the additional financial responsibility; negative effects on board-staff relationships; eventual cutting of the grant, leaving boards to make unpalatable budget decisions; and the introduction of school-site negotiation of teacher salaries and employment conditions. Trustees did not feel that this was their role, or, as volunteers and amateurs, within their capabilities (Wylie, 1997b, pp. 136–137). Concerns about a shift to school-site bargaining, having to take total responsibility for school property, and the extra administrative workload associated with full financial responsibility increased with the proportion of Māori enrolment in a school (Wylie, 1997a, p. 16).⁷

For schools to reconsider bulk funding, many would need additional funding, guarantees that funding levels would remain stable or could be increased in line with need, guarantees of adequate minimum staff:student ratios, the continued provision by the government of funding for capital works, and the retention of national collective employment contracts (Wylie 1997a, p. 16).

⁶ If schools took on more staff than they were entitled to under the orders-in-council regarding staffing and returned to central funding, they could continue to fund any additional staff only by using their own locally raised funds. TSG schools were much more likely than others to make limited-term appointments (see table 2), and this pattern is likely to have continued with the DRS schools.

⁷ The other school characteristics linked with differences in views were school type, with primary school boards more concerned than secondary school boards about new additional workloads for them, and school socio-economic decile, which overlaps with proportion of Māori enrolment in a school, since the decile rating includes the number of Māori students enrolled as one of its criteria. Decile refers here to the Ministry of Education’s ranking of socio-economic characteristics of the community served by a school, from 1 (the lowest) to 10 (the highest). The term “low-decile schools” refers to decile 1–3 schools. Low-decile schools were much more concerned than high-decile schools about the likely impact for them of bulk funding.

Most low-decile schools have 15 percent or more of their rolls comprised of Māori students (93 percent of decile 1–3 primary schools, and 96 percent of decile 1–3 secondary schools), compared with 15 percent of decile 7–10 primary schools, and 5 percent of decile 7–10 secondary schools.

Fully Funded Option

In 1998, the government moved to make the inclusion of teacher salaries into school operational grants more attractive to boards by basing the formula on the top of the salary range, rather than the average. This option is known as full funding. By 2 March 1999, 27 percent of schools have taken it up, under the condition that they can move back to the central funding of teacher salaries at their level of entitlement staffing after three years. A sum of \$220 million additional public funding was made available for this new option.

Reasons for Education Sector Opposition

The fully funded option remains controversial in the school sector, and is opposed by both NZEI (the primary teachers' union) and PPTA (the secondary teachers' union). Reasons for not taking it up are anecdotal, but include:

1. Estimates of long-term loss of government funding after an initial gain (of widely varying amount, depending on the school's present composition of teaching staff and hence their pay rates, based on qualifications and experience).
2. Fears about the volatility of school funding, with inevitable dips as rolls and staff profiles change.
3. No advantage seen in increased ability to move money between "operations" funding and "staff funding", since few schools wish to cut back on staff in order to buy material resources, or to pay fixed charges.
4. Fears that staffing decisions will need to be based on cost to the school rather than suitability, with an applicant who can be appointed at a cheaper rate winning over the most suitable applicant.
5. Centrally resourced schools have almost as much flexibility about their teaching staff as fully funded schools. All schools receive "management units" which they can distribute as they wish, and non-bulk-funded schools can also cut back on senior management positions through the use of units. They can also employ people on limited-term contract, or on a part-time basis; and employ beginning teachers and people with limited authority to teach (untrained people who can teach for a limited period of time). Fully funded schools do have flexibility in terms of starting teachers part-way through the year if roll numbers are predictably lower at the start of the year; this applies mostly to new entrant staffing in primary schools.
6. Fears that small schools will struggle, and that rural schools may not have the range of applicants for appointments that urban schools have, and hence the ability to choose cheaper teachers.
7. Fears that schools without boards or staff able to cope with the new financial demands (e.g., management of cash flow) and industrial relations demands will struggle, financially and in terms of morale.
8. Estimates that the benefits of some increased funding would come at the cost of good relations with staff, and changes in the role of the principal which would emphasise employment and management at the cost of the provision of educational leadership.

9. Erosion of national staffing schedules, national collective employment contracts, and the sense of being part of a national education system.
10. Falling rolls in low-decile schools with high Māori enrolment because of the exercise of parental preferences for higher-decile schools; this would mean that these schools could be losers over time, making it even more difficult for them to adequately meet the needs of their students, which are generally higher and thus more costly than others’.
11. Fears that full funding will become mandatory after a sizable minority of schools have become fully funded in order to obtain additional funding in the short-term.
12. Fears that mandatory full funding would pave the way for a voucher system with equal funding for private schools, and the privatisation of state schools.

The issues described here apply across the board, to Māori and non-Māori alike. Māori educators’ identification of Māori-specific issues are reported in section 3.

Parallels with Bulk Funding Elsewhere

Many in the education sector cite examples from other educational services (kindergartens, universities, English schools, and the funding of New Zealand schools at the turn of the century) which have experienced negative impacts from government funding being made in bulk amounts, in the form of cash rather than kind (staffing), using formulas which are based on averages rather than actual staffing costs, and allocated per student. In addition, bulk funding has been accompanied by decreased or static funding.

Bulk Funding—Cautions from English Experience

Schools in England⁸ are bulk funded. Trends observed there include the recruitment of beginning teachers rather than more experienced teachers, the employment of more classroom assistants and ancillary staff, increased use of temporary contracts for teaching staff, and cuts in senior management positions (Levacic, 1999; “School job search”, 1999) or increased class sizes (until the Labour government’s recent injection of funds to cut class sizes in primary schools).

English principal and teacher workloads have also increased substantially, with more principal time spent on school management and administration than on teaching or professional development. The attraction of the principalship is diminishing due to the change in role and high workload; the loss of stepping stones through the loss of senior management positions may also have an effect. More schools find it harder to fill principal positions or attract suitable applicants (Levacic, 1999; Rafferty, 1999).

Schools which can become more selective of students, have. (Whitty, Power & Halpin 1998). These are rarely those serving minority-group students. Truancy and exclusions (expulsions and suspensions) have increased. Schools serving low-income groups make up the majority of the schools identified by OFSTED, the English inspection agency, as failing; this pattern is also found in the Education Review Office analysis of its reviews of New Zealand schools.

Bulk funding in England was also accompanied by the introduction of a national curriculum for the first time, and new assessments, making it difficult to gauge the impact of bulk funding on student achievement. Of two studies focused on primary achievement, one showed no change over the first 7 years of bulk funding, and another indicated an increase in the number of children with

⁸ The English education reforms which introduced decentralisation began in 1988. The introduction of a national curriculum and mandatory testing have also played a part in raising teacher and principal workloads in the U.K.

poor achievement (Wylie 1998, p. 79). Preventing educational failure at the primary level through central initiatives, mandates, review, and funding has become a major focus of the educational policy of the Labour government which came to power in 1997.

Bulk Funding in New Zealand Kindergartens

Kindergartens in New Zealand, which cater for the second highest proportion of Māori children in early childhood education after *nga kohanga reo*, have come under pressure to reduce the requirement for teachers to be fully trained, though the longitudinal *Competent Children* study shows that staff qualifications are one of the keys to early childhood education centre quality (Wylie, Thompson, & Kerlake Hendricks, 1996, pp. 103–119). Kindergartens and playcentres were the two early childhood education services that rated most highly in the *Competent Children* study,⁹ despite kindergartens having much higher staff:child ratios and larger group sizes than other early childhood education services. If kindergartens need to drop their standard of employing only fully trained staff, the quality of one of the two early childhood education services which is most accessible to Māori may decline.

Kindergartens also face pressure to raise nominal voluntary donations (of \$5 a week). But for many kindergartens in low-income areas, often those serving Māori, raising the voluntary fee or making it non-voluntary would make kindergartens unaffordable for parents, and would reduce children's access. To date, kindergarten associations have endeavoured to resist these pressures by continuing to cross-subsidise kindergartens in low-income areas from their overall bulk-funded grant and trying to raise external sponsorship, but they are finding it increasingly difficult to cross-subsidise without additional funding (Davison, 1997). The underparticipation of Māori in early childhood education services has been noted by *Te Puni Kōkiri* as one of the key indicators of educational disparity for Māori (*Te Puni Kōkiri*, 1998, p. 11).

Bulk Funding in New Zealand Universities

New Zealand universities have seen sizable increases in teacher:student ratios, and large increases in student fees since the shift to bulk funding in 1990. Again, universities have endeavoured to hold back major changes in staffing and costs to students, in order to remain competitive. Some have been able to use their accumulated capital resources, but even these universities (e.g. Canterbury and Auckland) have reached the end of their ability to do so, particularly in an expansive era where additional student enrolment has been actively sought. This has resulted in recent large increases in student fees, and the cutting of less popular or less profitable courses and the staff who teach them, as cross-subsidisation becomes less possible, or is resisted by staff who find themselves in more popular or profitable areas. A recent study of university staff (Chalmers, 1998) showed that few believed that the changes to university funding had led to improvements in the quality of their work. It also showed that additional workloads and stress had increased work-related illness and injury, and lowered staff morale.

⁹ Te Kohanga Reo National Trust did not participate in the *Competent Children* study.

Bulk Funding of School Boards in New Zealand 1877–1901

From 1877 to 1901, New Zealand district education boards, which controlled state primary schools, were bulk funded.¹⁰ Funding was per child, and based (as is early childhood education bulk funding now) on attendance rather than enrolment.¹¹ McGeorge (1993) shows that this was a period of great expansion of new settlements and therefore a demand for new schools. It was also a period of economic difficulty, which led to some cutbacks in central funding. Both the decrease in funding and demand for spending on capital works led to districts cutting back on spending on teacher salaries through using cheaper teachers, that is, pupil teachers and women. Salaries were left to boards to set, and varied widely, with some district boards paying double the amount paid by others. This played a part in differences between districts in the turnover of male teachers, with movement away from low-paying districts to higher-paying districts, though teachers in low-paying districts found it difficult to secure teaching jobs elsewhere. Large class sizes were also crucial in allowing boards to manage their bulk funding.

Teacher salaries were linked to the average student attendance at their school, which meant that boards had to cross-subsidise small rural schools to ensure they were staffed and teachers could be paid. McGeorge concluded that without this ability to cross-subsidise, the inequalities between school resourcing, including staffing, would have been much greater, and noted that cross-subsidisation is not possible in the present system, with no bodies responsible for schools in an area, and each school responsible for its own management.

The financial difficulties were greatest for small districts, who were least well placed to cross-subsidise. The inequalities between districts led in 1901 to the establishment of the first national collective employment contract for teachers, and the separation of teacher salaries and operational funding.

¹⁰ Native schools did not come under district education boards, but the Department of Native Affairs, and then the Education Department. They were not bulk-funded. While the central government funded some of the cost of building and maintenance, local Māori had to supply at least an acre of land, half the total expenditure on buildings and repairs, a quarter of the teacher's salary, and the cost of school books (Barrington & Beaglehole 1974, p. 101).

¹¹ Using attendance rather than enrolment requires additional administrative time for kindergartens, and can lead to reduced funding where attendance can be irregular, or there is a transient population, as in many kindergartens in low socio-economic areas.

2. RESEARCH ON BULK FUNDING

Evaluations of the Salaries Grant for Management, Teacher Salaries Grant, and Directly Resourced Schools provide some indications of the impact of bulk funding on schools, but provide little analysis in terms of school characteristics such as proportion of Māori enrolment. Research on the TSG provides a little more analysis of this kind.

This means that while it is likely that the general findings would also apply to high-Māori-enrolment schools, any particular differences which may emerge have to be gauged by putting this information together with the information we have about how these schools have fared under self-management. We do this in the concluding section of this report.

Salaries Grant for Management (SGM)

The SGM put actual salaries for senior management into schools' operating grants, at 4-weekly intervals, in advance. School bank accounts were debited by the payroll service of the Ministry of Education for the amount needed to pay senior management on paydays. The Ministry of Education also funded schools' ACC and GST payments¹², and the funding reflected changes in school staffing, such as the appointment of new staff, improvements in qualifications of existing staff, or grading changes as a result of roll fluctuations.

Kerslake (1995) reported that the interest generated from this payment in advance and an improved cash flow were the main gains noted in a national representative sample of principals and trustees. The money gained was not large (though interest rates then were double current interest rates), and was not used for purchases or additional staffing.

The drawbacks for some schools of the SGM were:

- An increased workload for some schools. This additional work was usually done by school support staff, or trustees who were also accountants.
- The introduction of more complex accounting systems. This was necessary to cover the need for new monitoring and checking processes, especially to cover changes in cash flow (and the need to ensure that school bank accounts had sufficient money in their accounts to cover salaries for senior management on payday).

Few principals and trustees supported changing future funding to a fixed-payment basis rather than actual (and varying) salaries.

Table 1
Support for Bulk Funding Based on Fixed Amounts

	Primary		Secondary	
	Principals	Trustees	Principals	Trustees
Fully support	9	3	13	12
Support with reservations	30	28	38	40
Opposed	59	58	46	42

¹² ACC: Accident Compensation Corporation: former government compensation scheme, requiring employer levies; GST: goods and services tax.

Comments indicating the reasons for reservations or opposition focused on:

- Concerns that fixed payments would not allow schools to cover staff changes.
- Pressure to employ less experienced and qualified teachers.
- Increased conflict between board and staff. (One principal of a low-decile school noted that teaching salaries at the school were much higher than most of his employed board members received, and that this could create particular tensions if schools also had to take responsibility for negotiating employment contracts.)
- The school would face financial problems if it did not have the skills to handle the money in a more complex set of financial systems than they needed to manage operational grants.
- The likely loss of national salary scales, and the great change to board workloads that this would create if schools had to negotiate contracts for all staff.
- The greater efficiency of having one national payroll system rather than one for every school.

Teacher Salaries Grant (TSG)

The TSG came into effect between 1992 and 1995, with 70 self-selected schools participating, including 4 kura kaupapa Māori.

Ninety-four percent of these schools benefited financially from their participation. Dollar gains ranged from less than \$5,000 a year to more than \$100,000 (Edwards, 1994a), depending on the roll of the school. Of the three kura kaupapa Māori identified as taking part in 1993, one gained less than \$5,000, and another between \$5–10,000; the gain of the third kura kaupapa Māori was not known due to changes in the principalship. Although the dollar amounts do not appear large, any additional money was welcomed by the kura. The other main reason given by one kura (included in the evaluation's case studies) was that it provided greater autonomy for the school, in terms of tino rangatiratanga (Edwards 1994b, p. 79).

These gains result from the schools' having staffing compositions that meant their teaching salaries were below the average; from money which continues to come in when positions are unfilled, or in the process of being filled; and from any interest gained from having money paid in advance (dependent on the health of the school's cash flow).

The Ministry of Education funded a study which monitored changes in the schools over time, through surveys of principals, teachers, and trustees, and case studies of 14 schools. We focus here on the information from the final survey. The quantitative data were not analysed in terms of the proportion of Māori enrolment in schools, and the number of kura kaupapa Māori taking part were too few to analyse quantitatively. Where material can be separated for kura kaupapa Māori, we have done so.

Return rates were: 92 percent of principals (N=62), 54 percent of teachers (N=214) in the 14 case study schools (distributed through the staff representative on the board of trustees), and 74 percent of the trustees (N=239).

Principal and trustee views were more similar, and positive, than teachers. This may reflect the fact that the teacher sample was drawn from only 14 schools.¹³ The authors of the final report also note that the similarity in principal and trustee views may reflect their experience that trustees get most of their information from their school's principal (Hawk & Hill, 1994, p. i).

The study found that the main uses of the TSG were for:

- teacher salaries (94 percent of principals),
- additional programmes for students (55 percent of principals),

¹³ Unfortunately, the study does not draw together principal, trustee, and teacher views for the 14 schools on their own, which would allow some checking of this point.

- support staff salaries (48 percent of principals),
- additional programmes for staff (31 percent of principals),
- equipment/resources (28 percent of principals), and
- capital works (14 percent of principals).¹⁴

Examples of the uses made of the additional resourcing which came with the TSG were:

Additional staff were hired to fulfil a number of roles on either a full-time or part-time basis. They were used as classroom teachers to reduce the teacher/pupil ratio; as specialists such as kaiāwhina, sports co-ordinator, Pacific Island liaison; for teacher support such as teacher aides, a 'floating' relieving teacher; for providing administrative support staff. (Hawk & Hill, 1994, p.11)

Examples of the use of teacher aide time included release of teachers while the aide provided relief cover, and to promote specialised programmes such as accelerated learning, oral language tuition, and increased reading recovery allocations (p. 75).

Examples of extra programmes offered were:

. . . programmes for students with special needs, either extension or remedial; offering a wider choice of subjects; providing immersion or bilingual Māori classes; specialist teaching programmes in such areas as music, speech and drama, te Reo Māori, foreign languages; pastoral care and tertiary courses. (p. 12)

The type of resources and equipment purchased with the fund were computers (most mentioned) for student use, for administration or in the library; library books; sports gear; video recorder; video camera; school camp subsidies and resources for starting a recapitated class. (p. 13)

Capital works for which the TSG funds were used were a multi-purpose room; an enlarged library; computer room; performing arts centre; hall; Technicraft facility; classrooms to allow recapitation to take place and upgrading a school. These capital works were either wholly or partly funded by TSG funds. (p. 13)¹⁵

While 74 percent of the schools kept separate accounts for their TSG grant, around a quarter did not, and therefore found it harder to say what the TSG had been used for.

The benefits of the TSG were sourced by the trial schools in additional funding, or a combination of the additional funding and increased management autonomy. None of the schools ascribed any improvements they had made only to their increased ability to locally manage staffing levels and resources. Hawk and Hill (1994) noted that what schools understood by

¹⁴ p. 5. The Association of Bulk Funded Schools also surveyed the 69 trial schools, with responses from 66. The main use of the TSG reported by the schools gives a similar picture to the larger study funded by the Ministry of Education.

- 95 percent of the TSG schools employed extra staff. The TSG enabled schools to employ on average 1.15 teachers over their entitlement per school in 1992, 1.47 in 1993, and 1.59 in 1994. This translated into an additional 76.97, and 105 extra positions (Raffills, 1995a).
- 66 percent reported increased professional development, classroom resources, or using the money to buy increased teacher relief time.
- 61 percent employed additional teacher aides/ancillary staff.
- 43 percent had made some changes to their management structure.

¹⁵ Schools can get matching grants from government for capital works, with higher subsidies for low-decile schools. The study does not record whether such assistance was used in these cases.

“flexibility” encompassed both extra funding and local autonomy (pp. 22–23).

Difficulties with the TSG were reported by 39 percent of principals, 34 percent of trustees, and 41 percent of teachers. The main problems were:

- Extra work for principals and trustees in budgeting, administration, and dealing with the State Services Commission, the payroll services, or the Inland Revenue Department.
- School/staff disharmony (reported by trustees and teachers, but not principals).
- Insecurity about the impact at the end of the trial (particularly what might happen to the extra teachers employed with the additional resourcing coming with the TSG).
- The impact of fluctuating rolls, and difficulty of planning if rolls fluctuated. (The TSG cushioned schools with falling rolls.)
- Additional workloads for more experienced teachers when younger teachers were employed, particularly when several were employed at the same time, or the school was small.

Staff Payment and Conditions

Examples of flexibility (additional resourcing coupled with increased local management decision) were:

- Payment for teachers’ extra time, e.g., for sports coaching, extension programmes.
- Giving new appointees higher steps on the salary scale in recognition of relevant work experience other than teaching.
- Special character schools (e.g., Steiner and Hare Krishna) were able to pay full teaching salaries to staff who would not qualify under state regulations (Hawk & Hill, 1994, p. 24).

Secondary schools and kura kaupapa Māori were more likely than other schools to appoint unregistered teachers (p. 31). For the kura, this may reflect their exemption from having to appoint properly qualified teachers, the comparatively small amount of additional money they received under TSG, or the dearth of fully qualified teachers who are proficient in Māori language.

In 1994, the TSG schools made 184 appointments. The table below compares the nature of these appointments with data from the 1998 teaching census. It shows that although a 1995 survey by the Association of Bulk Funded Schools reported that “no school reported purposely employing younger or cheaper teachers” (Raffills, 1995b), the pattern points toward a less permanent teaching work force, and more use of beginning or unqualified teachers in bulk-funded schools compared to schools nationwide. This is despite the increase in teaching numbers from 1996, when more than 800 positions were added nationwide after improvements in the teacher/student ratio to decrease class sizes in primary schools, and some schools experiencing volatility in school rolls, which makes temporary appointments more attractive.

Table 2
Teacher Tenure, Type, and Registration:
Comparison of Teachers in TSG Schools and All Teachers

Teacher Characteristics	Teachers in TSG	Teachers in All
	Schools (bulk funded) %	Schools ¹⁶ %
Tenure		
Permanent	31	80
Contract	18	6
Limited	50	14
Type		
Full-time	73	84
Part-time	27	15
Registration		
Registered	64	83
Provisional	24	11
Not registered/limited authority to teach	12	3

The greater number of limited-tenure appointments in TSG schools compared to the national picture is also likely to reflect the fact that TSG was a trial, with a limited number of years. Schools may have been uncertain that the additional funding which allowed them to increase their staffing would continue. The temporary nature of the trial also meant that all changes to employment conditions which might arise from bulk funding were not able to be fully demonstrated by the trial (Hawke & Hill, 1994, p. 38).

Forty-six percent of the principals thought their employment conditions had improved, compared with 22 percent of the teachers (p. 35). There was some stress reported from examples such as “pressure to develop individual contracts, some staff accepting contracts and bonus payments, and the advertising of a position with a negotiable salary” (p. 38).

Forty-one percent of schools adjusted salaries, by giving bonuses or incentives; and examples were given of differences arising between staff who felt their contribution to the school was just as worthy of extra reward as others who received extra payment (pp. 41–43).

Other Changes

Bulk funding was said to have improved school morale according to 54 percent of the principals, 62 percent of trustees, but only 16 percent of teachers (from 11 of the 14 study schools) (Hawk & Hill, 1994, p. 45). A similar pattern emerges with principals and trustees feeling that relations between teachers and board were enhanced, and principals were able to show more curriculum leadership. There was agreement that principals had become business managers: 61 percent of trustees, 64 percent of principals, and 74 percent of teachers (p. 57).

A minority of schools reported other changes which they attributed to the TSG:

- More community involvement—36 percent of principals, 44 percent of trustees, 21 percent of teachers (p. 69); though one kura kaupapa Māori attributed this to its philosophy rather than the TSG.

¹⁶ Source: Sturrock (1999), p. 2.

The examples given of more community involvement are mainly to do with one dimension only—fundraising.

- Thirty-four percent of principals and 20 percent of teachers thought their opportunities for career development had improved.
- Strong belief that the school was now providing a better curriculum: 38 percent of trustees, 44 percent of principals, and 11 percent of teachers (teachers from 11 of the 14 schools disagreed).

Using the TSG To Increase Responsiveness to Māori

A few examples are given of specific uses of TSG resources which are focused on Māori. They appear to come from schools with high-Māori-enrolment or from kura.

. . . without bulk funding the kura would have 1 teacher and 1 teacher/principal. Bulk funding allows us to employ 2 fulltime teachers and a principal therefore allowing more quality teaching time. (Hawk & Hill, 1994, p. 76)

Bilingual classes have had more resources e.g. extra teaching staff (part time). SC Māori results excellent. (Secondary school trustee, p. 76)

Extra non-kura curriculum activities, e.g. Hui on Marae, related to essential learning areas of curriculum which are not always known, e.g. Tikanga a Iwi, Pokai, Kingitanga, Hahi Māori etc. (p. 76)

An integrated school noted that “additional Māori programmes were available in 1993, but these were the result of underpaying management salaries” (p. 36).

The evaluation of the TSG also included interviews with principals from a range of schools, matching TSG schools with others who did not take up this option. Edwards (1994b) describes the uses made by one small kura (with around 35 students) of its TSG of an additional \$27,000 to employ, on a limited or part-time basis, parents with expertise in music, Māori culture, reading recovery, art, carving, and computers, and tutors to work with children individually on their Māori and English. The 2-teacher (the principal and a probationary teacher) school could not find a qualified teacher to employ (Edwards, 1994b, pp. 79–82). In the second year of the TSG trial, the kura also used its TSG money and part of its operational grant to employ a third teacher, who was a probationary teacher. The principal thought he and the whanau had gained useful management skills, though they had to guard constantly against the “temptation to spend as they please on all sorts of things” (Edwards, 1994c, p. 76). These advantages of the TSG were set against the higher workload for the principal, and deterioration in his employment conditions.

I have come to understand NZEI concerns about decreasing educational spending. When you have a limited fund you cannot possibly have open conditions and rewards for your teachers. (p. 76)

The matched kura would have lost \$18,000: it employed 2 experienced teachers. The 2 teachers were concerned that they would lose “the confidentiality of their employment, as they did not want the local community to know about individual earning levels or to make decisions on such matters” (Edwards, 1994b, p. 81). In the second year, the chairperson from this kura’s board of trustees pointed to the quality of staff as a key issue: the “personnel here makes us a winner” (Edwards, 1994c, p. 77).

Caveats

Hawk and Hill (1994) note that the changes made were often minor, and that the links with the TSG were sometimes “tenuous”, or it was not possible to say if bulk funding was the only factor involved (pp. 80–81).

Additional resourcing seemed key to trustee and teacher views of the TSG. Only seven percent of trustees and two percent of teachers strongly favoured the continuation of the TSG if it meant the school would get less rather than more money over the next few years. Principals were much more inclined towards bulk funding: 76 percent were strongly in favour. This raises the possibility that bulk funding appeals to certain principals particularly; the indications from the study were that principal (as opposed to board) decision-making power was extended by the introduction of the TSG.

Finally, Hawk and Hill (1994) warn that:

Because this is so unrepresentative of the national situation, the results of this research cannot be generalised to all New Zealand schools. They are only a valid indication of what would be likely to happen for schools which would receive extra funding as a result of becoming bulk funded.
(p. 1)

Directly Resourced Schools (DRS)

The patterns found in the TSG study are also evident in the two studies of the impact of DRS in schools. DRS schools also benefited financially from their switch to bulk funding.

In 1996, DRS primary schools received \$241 per student more in government funding than others which remained centrally funded. The financial gain for secondary schools was much smaller, around \$9 per student (Wilson & McAlevey, 1999, pp 9–10).

A 1998 survey of DRS schools found that DRS schools were likely to have made changes as a result of becoming directly resourced to staffing (94 percent), to buildings (56 percent), and to the management or administrative structure of the school (48 percent), (Kennedy & Bennie 1999, p. 20). In 1998, 68 percent of the DRS schools employed staff above their entitlement, with an average of 1.7 additional FTE (full-time equivalent) more than their entitlement. Three-quarters of the DRS schools also employed specialist staff, mainly teacher aides, special needs teachers, administrators, or accountants. Te reo Māori was one of a range of other specialist areas mentioned, as were kaiāwhina and kaumatua (Kennedy & Bennie, pp. 25–26).

Principals and others surveyed were generally positive about the DRS. Three-quarters felt it had enabled them to provide a better curriculum, through the employment of additional teachers and support staff, the provision of smaller classes or more individual attention to children, and, for some, through the ability to spend more time on curriculum development and professional development, and the employment of specialist staff, including in te reo Māori (Kennedy & Bennie, p. 45). One example of these changes mentions that “the change from mainstream to Total Immersion Māori has been better achieved because of our ability to allocate more resource hours” (Kennedy & Bennie, p. 46).

Around half the respondents felt that learning outcomes had been improved for all students in their school, 27 percent for a specific group of students, and 16 percent for individual students. Respondents were not asked to gauge any changes for the school’s Māori students, as a specific group. The comments made here focused on the additional resources available to students through DRS. Comparative learning outcome data were not provided. However, it is probably too soon to analyse the impact of DRS on student achievement, and there has been no analysis of national examination results or assessments in terms of whether the school was bulk funded (and for how

long).

The DRS schools provided a broad cross section of New Zealand schools in terms of socio-economic decile.

No analysis was done of any differences in the use of the DRS in terms of school characteristics, such as proportion of Māori enrolment. It is therefore difficult to tell whether Māori students have been prime recipients of the extra resourcing which went to DRS schools.

Fully Funded Option (FFO)

This option is too new to have been properly evaluated. Some comparisons of fully-funded schools and others were included in an ERO report in November 1999¹⁷, and these are reported and commented on below.

Data on the characteristics of primary and secondary schools taking this option show that its take-up is even across schools in terms of their Māori enrolment and decile. High-Māori-enrolment and low-decile schools are no more (or less) likely to opt for full funding than other schools.

However, there was a relation between proportion of Māori enrolment and take up of full funding in composite schools, with more take-up by composite schools with very low Māori enrolment (57 percent compared with 32 percent of high-Māori-enrolment composite schools)¹⁸.

¹⁷ Education Review Office (1999). *Good Practice in Managing the Fully Funded Option*. Wellington: Education Review Office.

¹⁸ Three of the 29 composite schools were kura kaupapa Māori. Thirteen were state area schools, and 13 were integrated state schools (9 Christian, 3 Steiner, and 1 other).

Table 3
Comparison of Fully Funded and Centrally Funded Schools

	Primary and Intermediate		Secondary	
	Fully Funded*	Centrally Funded %	Fully Funded %	Centrally Funded %
% Māori enrolment				
<8	29	32	33	30
8–14	17	16	18	22
15–29	24	22	26	27
30+	30	30	23	21
Decile				
1–3	31	30	23	28
4–6	30	29	38	38
7–10	39	41	40	34
Size				
<35	9	14	–	–
35–99	15	29	–	–
100–199	16	23	3	7
200–299	17	15	7	8
300–499	32	16	19	25
500–750	12	3	16	26
751+	–	–	55	34
Location				
City	54	43	60	61
Secondary urban	10	5	10	10
Minor urban	10	10	20	21
Rural	18	42	10	10

* As at 2 March 1999.

The main school characteristics related to take-up of bulk funding were type of school and school size. Intermediates had the highest take-up rate, 57 percent, followed by composite schools, 46 percent. The secondary school take-up rate was 30 percent, and primary, 24 percent. Take-up rates were much the same for primary schools with rolls of fewer than 200 (18 percent over all), rising to 28 percent of schools between 200–299, 42 percent of schools with rolls of 300–499, and 56 percent of schools with rolls over 500. For secondary schools, there was a much higher rate of take-up among schools with 750 students or more (41 percent compared with 23 percent of smaller secondary schools).

The main reasons for the take-up of the FFO option would appear to be based on its greater workability among larger schools (as foreseen by early policy papers¹⁹), the particular staffing composition of individual schools, interest in taking total responsibility at the school level for school budgets, and the safety net of returning to central resourcing after 3 years.

Of particular interest was the take-up of FFO by kura kaupapa Māori: 25 percent (15 out of 59

¹⁹ The 1990 policy paper also foresaw the need to pitch bulk funding at the top of the salary scale, and not the average, given the fact that the teaching work force was mostly at or near the top of the salary scale.

schools).²⁰ This was about the same take-up rate as primary schools, and lower than the other school types. Thus the FFO does not appear to have appealed more, or less, to kura kaupapa Māori than to mainstream schools.

The ERO report drew on ERO review material. It found that the extra funding provided by full funding was most likely to result in additional staff, curriculum resources, or property initiatives. Additional staffing was mostly used to reduce class sizes, or release teaching principals from teaching, and to target children with low achievement. Māori students were not specifically mentioned. Teachers of te reo Māori are mentioned amongst the kinds of specialist teachers employed using FFO funding (p. 16).

The ERO report also looked at overall school performance on ERO reviews. It showed that the overall performance of fully-funded schools reviewed in 1999 was more likely to be satisfactory than those of centrally resourced schools. This could reflect the fact that larger schools were more likely to be fully funded, and smaller schools are more likely to fail ERO reviews.²¹ The ERO report appears to show that full funded schools were more likely to make improvements after review, and less likely to need further review. However, this analysis is flawed; there are no statistically significant differences between the two groups of schools. The number of schools which were judged poor remained the same before and after the take-up by individual schools of full-funding. There is thus little evidence that full-funding improves school performance, though the evidence is limited to an initial period of probably too short a duration to properly gauge improvements.

²⁰ This includes all kura kaupapa Māori, including the 3 composite schools.

²¹ Connelly, M. School failure: some possible remedies. *Public Sector* 22(3), p.8-11.

3. DECENTRALISATION: WHAT HAVE THE CHANGES MEANT FOR MÄORI?

Some Improvements

Over the last decade, the main improvements for the provision of education for Mäori students in compulsory schooling are related to increased central resourcing, mainly for Mäori initiatives. The most notable development has been increased government support for kura kaupapa Mäori (there are now 59), though this development has been capped by the government at five schools a year, despite keen interest amongst Mäori to extend their number more rapidly to provide continuing immersion education for children from kohanga reo.

Central funding resourcing for curriculum resources in Mäori has improved. There has been substantially improved funding for classes taught in te reo Mäori, from \$71.33 for each Mäori student in 1990 (then called Mäori-language funding), to the more targeted support for Mäori-language programmes (ranging from \$51 for each Mäori student receiving less than 30 percent of their instruction in te reo Mäori, to \$840.48 for each Mäori student receiving 81–100 percent of their instruction in te reo Mäori).²² The proportion of Mäori teachers has increased in primary schools from six percent in 1990²³ to nine percent in 1998, in secondary schools from four percent to seven percent, and in composite schools from 10 percent to 20 percent. Indeed, the number of Mäori teachers has almost doubled since 1990 (from 1,847 to 3,253), and there seems to have been an even greater increase in the number of teachers who speak Mäori—from 429 in 1990 to 3,434 in 1998. However, the two surveys asked different questions: in 1990, whether the teacher spoke Mäori, and in 1998, the language they used in school. In 1998, there were 939 teachers confident in delivering the curriculum in Mäori in an immersion setting, and 2,495 in a bilingual or partial immersion setting.

The increase in the number of teachers speaking or using Mäori over the eight-year period could be as high as four-fold. It seems likely that the increased government support for kura kaupapa Mäori, the shift to more targeted funding for immersion programmes, and the use of external verifiers (funded by the Ministry of Education) to check that school programmes are indeed using te reo Mäori have all played a role in this increase. However, it also seems likely that the increase reflects the ability of kura kaupapa Mäori and mainstream schools providing immersion programmes to employ unregistered teachers.²⁴

Mäori teachers now form eight percent of the overall teaching force, up from five percent eight years before. This is a substantial increase. However, this is still well short of the proportion of Mäori students in schools, 20 percent of the compulsory school population.²⁵

²² Students receiving 30–50 percent of their education in Mäori are funded at an additional \$210.12 per student, and those receiving 51–80 percent of their education in Mäori are funded at an additional \$420.24 per student. In addition, low-decile schools (high-Mäori-enrolment schools) receive higher government funding per student.

²³ Ministry of Education (1992).

²⁴ The recent Teacher Census summary does not give a breakdown of teacher registration in terms of ethnicity.

²⁵ In 1990, Mäori students formed 18.6 percent of the student population, 121,307 students out of a total school population of 650,572 (Davies & Nicholl, 1993, p. 36). In 1998, Mäori students formed 20.1 percent of the student population, 144,403 students, out of a total school population of 719,504.

Continued Disparities between Māori and Non-Māori

However, there is little evidence that decentralisation is associated with improved educational outcomes for Māori students. Te Puni Kōkiri's (1998) analysis of educational disparities also shows that while some reduction in disparities between Māori and non-Māori occurred during the 1980s, before decentralisation, little progress has been made in the 1990s for secondary school retention rates, and school leaver qualifications (pp.10–12)²⁶.

Māori also continue to be suspended from schools more than others. In 1992, Māori students made up 33 percent of suspensions; in 1998, 44 percent. Actual numbers of suspensions (not students) rose from 1,694 in 1992 to 5,236 in 1998, an increase of 209 percent compared with an increase of 96 percent for non-Māori.

No long-term assessment data are available for primary schools. Māori performed less well than non-Māori on the National Education Monitoring Project's first round of assessments of Year 4 and Year 8 students for all but art (Minister of Education, 1997, pp. 58–62; Minister of Education, 1998, pp. 72–73). These assessments were carried out in 1994–98, five to nine years after the start of school self-management.

Additional Problems for Schools with High Māori Enrolment

NZCER's national surveys of the impact of the introduction of self-management on primary schools between 1989 and 1996 showed that high-Māori-enrolment schools (those whose Māori students are 30 percent or more of the school roll) faced more problems than other schools (Wylie, 1997b). Most high-Māori-enrolment schools are also decile 1–3 schools (78 percent for primary schools) and serve low-income communities.²⁷

These problems, some of which are likely to have existed prior to decentralisation,²⁸ continued despite a six percent loading of the per student funding rate for decile 1 schools. They include:

- More children whose home economic circumstances declined, with a negative effect on health, concentration, and behaviour (Wylie, 1997b, pp. 166–167).
- Higher levels of truancy, though most high-Māori-enrolment schools have initiatives to address truancy, half using school funds, half using government funding (p. 167).
- Lower levels of funds raised locally, despite greater efforts, and lower proportions of parents paying the school donation (p. 167).
- More difficulty finding suitable staff, more employment of non-registered teachers (either unqualified, or recent graduates), more days when classes were without a teacher, more difficulty finding relieving staff (pp. 44–46), and more teachers thinking of changing careers. Only 17 percent of the teachers in high-Māori-enrolment schools in the 1996 NZCER survey were Māori; but the bulk of the Māori teachers taking part in the survey were to be found in high-Māori-enrolment schools (p. 52).
- Poorer quality classrooms, less adequate recreational space, more vandalism, and increases in property management costs (p. 167).
- Less community support, and less ability to get parental help.
- Parents were less likely to raise issues with their school board (p. 109).

²⁶ This is consistent with reviews of the impact of school self-management showing that it has little bearing on student achievement, and is unlikely to increase overall levels of achievement unless it is accompanied by substantial additional funding, and central initiatives and resources, particularly in the areas of curriculum and professional development (see e.g., Hannaway, 1995; Townsend, 1998).

²⁷ As noted earlier, Māori enrolment is one of the factors included in the composition of school decile ratings.

²⁸ No comparable data are available to provide a national picture of schools prior to decentralisation.

- Parents remain less likely to discuss their child's report with the teacher.
- Schools are more likely to have declining rolls, and be in vulnerable financial health.

The schools which are faring best under school self-management in terms of roll numbers, staffing, and financial health are decile 9–10 schools, with low Māori enrolment.

Thus school self-management appears to show, at best, no closing of the disparity gaps between schools serving mostly Māori students, and those with few Māori students, and, at worst, to increase the difficulties faced by these schools.

Responsiveness to Māori Students

The original framework for school charters, which were to form the linchpin of school accountability to the school community and the government, had a clear emphasis on equity and improving education for Māori. The 1989 Education Act (section 63) stated that each charter was deemed to contain:

- (a) The aim of developing for the school concerned policies and practices that reflect New Zealand's cultural diversity, and the unique position of Māori culture; and
- (b) The aim of taking all reasonable steps to ensure that instruction in tikanga Māori (Māori culture) and te reo Māori (the Māori language) are provided for full-time students whose parents ask for it.

This legislation still stands (though the Act is due for revision later in 1999). However, it has proved difficult to use the charters as the basis for school accountability (Wylie, 1995). There is also a National Education Goal 9 (of 10), (Ministry of Education, 1997, introduced 1993):

Increased participation and success by Māori through the advancement of Māori education initiatives, including education in Te Reo Māori, consistent with the principles of the Treaty of Waitangi.

However, though this goal is part of the legal responsibilities of boards of trustees, and the Education Review Office comments (negatively) on overall national provision for Māori, it is difficult to operationalise Goal 9 in terms of individual school accountability.

Initial activity in relation to programmes or policies designed for Māori students, consultation with the Māori community, and staff development focused on the Treaty of Waitangi or Māori issues, peaked in 1990–91 (Wylie 1997b, p. 150–151). On the whole, since then, there is little evidence of increased responsiveness to Māori students. The consultations for the development of the Māori Education Strategy in 1997 showed that Māori remained concerned that schools were not meeting the needs of their children.

Where there are efforts to improve educational provision for Māori children, it is likely to be in schools with high proportions of Māori students, and in areas for which increased targeted funding is available, and for which there are additional accountability processes, such as Māori-language resourcing,²⁹ as the next section shows.

²⁹ Seemingly targeted funds such as the Special Education Grant (SEG) which are included as per student amounts in operational funding have no additional accounting processes to ensure the money is spent on eligible students. Half the schools surveyed on their SEG use in 1998 spent less than they received in SEG funding, and half spent more (Pratt, 1998), indicating the per-student funding for targeted population based on school decile ratings and included in school operational funding may not be the best way to meet actual student needs.

Programmes and Policies

The NZCER 1989–1996 surveys of the impact of educational reform on primary schools show that most of the development of programmes or policies to counter Māori disadvantage in schools was done before 1990, and confirm the importance of direct government encouragement if schools are to take a planned approach to improving Māori educational experience.³⁰ In 1996, 41 percent of primary schools surveyed by NZCER had some programmes or policies for Māori students, a decrease over previous surveys (Wylie, 1997b, p. 151). Programmes or policies designed for Māori students were most likely to occur in high-Māori-enrolment schools (74 percent), falling to 24 percent in schools with less than 15 percent Māori enrolment.

Keegan (1997) also found that schools with high Māori enrolment were not likely to be offering programmes for Māori students which were judged by schools to be making a positive difference to their Māori students' educational achievement or participation. The most common initiatives at primary and secondary schools were non-academic programmes (Māori culture or *kapa haka*) or bilingual/immersion units.

Schools with less than 15 percent Māori enrolment were more likely to have no particular initiatives for Māori students, and to report that Māori were achieving satisfactorily in mainstream activities. Often principals of high-Māori-enrolment schools would have liked to offer wider programmes, but were constrained by lack of appropriate teachers and money, or lack of Māori parental support. Principals of schools with less than 15 percent Māori enrolment also mentioned money, but the small number of Māori students was the main reason given for not offering specific Māori programmes.

The NZCER survey found that high-Māori-enrolment schools spent more money on Māori-language materials in 1996 than they had the year before (35 percent falling to 4 percent of low-Māori-enrolment schools). This indicates that high-Māori-enrolment schools were likely to be more responsive to Māori students. Fourteen percent of all primary schools responding spent more on Māori-language materials in 1996—but 10 percent cut back on these materials from the previous year, indicating that such spending may not be high priority (out of 11 items, it came sixth in the list for spending cuts, and bottom in the list for spending increases).

National data on spending do not give the detail which would enable the tracking of spending over time on Māori students, or Māori-language materials.

Nineteen percent of the primary schools responding to the 1996 NZCER survey employed *kaiārahi i te reo Māori*, who support children's learning in Māori. Six percent were employed for fewer than 5 hours a week, 2 percent between 6 and 10 hours, and 11 percent for more than 11 hours. Twenty percent of the principals would have liked to employ more *kaiārahi i te reo Māori*, or increase the hours of those they had. Fifty-seven percent of principals believed their school needed more support staff in 1996, much the same as in 1989, even though schools have employed more support staff since 1993. Increases in support staff occurred more for the areas of caretaking, clerical support, special aides, and library than for Māori language (Wylie, 1997b, pp. 46–47).

Three percent of teachers in the 1996 NZCER survey cited Māori language as their most useful area of training or advice in the last 12 months (p. 67). In 1991, 22 percent of primary teachers responding to the NZCER national survey said they had introduced more Māori language to their curriculum; in 1993, 34 percent, and in 1996, 26 percent. Teachers in mid- and high-Māori-enrolment schools were twice as likely as others to increase their use of Māori language.

Thus responsiveness to Māori students under school self-management is dependent on school characteristics and resources. The proportion of Māori enrolment in a school and the availability

³⁰ This is not to say that other programmes designed to generally improve student interest or achievement may not also be appropriate or useful to Māori students.

of targeted funding to provide education in te reo Māori seem to be key elements in the ability and willingness of individual schools to increase their responsiveness to Māori students.

How Important is “Critical Mass” in Responding to Māori Students?

The evidence above suggests that a “critical” mass of Māori students may be necessary before schools become more responsive in ways which acknowledge different needs. Under self-management, it is in fact difficult for mainstream schools to be responsive to minority groups, if other parents, or trustees, perceive that something more is being provided than for students as a whole.

The Monitoring Today’s Schools project, based on case studies of a range of 15 schools over the first three years of the shift to school self-management, found that the reforms brought an increase in the number of boards with Māori trustees. Where there was more than one Māori trustee on a school board, “there was a greater likelihood that changes were made to better meet the needs of Māori in the school” (Jefferies, 1993, p. 52).

Johnston (1992) also found that lone Māori trustees found it difficult to use their position to improve provision for Māori students. She found only 32 self-identified Māori trustees on the New Zealand School Trustees Association’s (NZSTA) voluntary register for the 78 Auckland region schools with 20–30 percent Māori enrolment. Most were co-opted rather than elected, and all but three of the 16 she interviewed (from 12 schools) were the “Māori representative” (p. 17). Some had initiated whanau groups “which met regularly to advise the Māori member on the wishes of Māori parents” (p. 17). Most of the women trustees “spent a great deal of time contacting the Māori community, by telephoning parents or ‘door-knocking’ to meet and obtain the opinions of the Māori parents in the community” (p. 18). However, all but one of the trustees said that there “was some difficulty in getting the Māori parents to participate in the decision-making for the school” (p. 17).

The Māori trustees interviewed by Johnston experienced some frustration with the allocation of Māori-language-factor funding, which was given to schools in relation to their proportion of Māori students. Under self-management, this money was not targeted, and the decision on its use was left to schools. Some Māori trustees knew nothing of this funding; others found that principal and teacher support were key to Māori involvement in allocation decisions, and whether or not its use was concentrated on Māori students.³¹ Some boards left allocation—and often aspects of implementation—to Māori trustees; others did not. “Where Māori were more ‘in control’ of the Māori Language Factor Funding, the implemented programmes reflected a greater commitment to Te Reo Māori” (p. 35).

Māori make up 13 percent of school trustees, with a higher proportion of Māori co-opted (rather than elected) compared with non-Māori. In 1998, 56 percent of all schools had no Māori board members (including principal, staff representative, student representative, and proprietor’s representatives), 23 percent of all schools had a single Māori on their board of trustees, and 22 percent of all schools had two or more Māori on their board.³² There has been little change in Māori representation on boards since 1989, when 52 percent of boards had no Māori members, 29 percent had one, and 19 percent, two or more Māori members (Garden, 1989, p. 11).

Most Māori trustees responding to the 1996 NZCER survey were in decile 1–4 schools. They were more likely than non-Māori trustees to be occupying the roles of secretary or specialist on Māori issues and equal employment opportunities and to spend more than six hours a week on

³¹ Partly because of concerns that the Māori-language-factor funding was not being used as originally intended, it was gathered into a wider funding pool, Māori-language resourcing, in 1996. This funds only Māori students in Māori-language programmes (see *also* page 14).

³² Source: Data Management Unit, Ministry of Education, April 1999.

their work as trustees.

Group vs Individual Identity

Another reason why schools with high Māori enrolment may not move to offer more programmes specifically targeted at Māori is teachers' continuing uncertainty about the value of treating children differently, stemming from beliefs that it is important to treat each child as an individual rather than as a group member (e.g., Wylie & Smith, 1995). This is also a reason why schools have moved only very slowly to provide analysis of children's progress in terms of their ethnicity. The Education Review Office (1997) noted in its annual report 1996–97 (p. 13) that "Despite widespread recognition by education sector agencies and schools that this disparity gap [between Māori and non-Māori] is widening", it was "uncommon for schools to aggregate and analyse achievement information for Māori students as the basis for better management of their education".

The 1996 NZCER survey also found that few schools appear to be using children's assessment results to pinpoint priorities for improvement. While half the principals in the 1996 survey said there was some aggregation of student results to produce school or class profiles, most of this use was for reporting to the school board, with only a third saying it was used in the school's development plan. Principals of high-Māori-enrolment schools were less likely to report that aggregated assessment data were reported to their school board.

Competition and Choice

A further, less palatable, reason for the relatively low level of changes in schools in order to become more responsive to Māori students is that school self-management appears to have sharpened already existing competition between schools (Ladd & Fiske, forthcoming; Wylie, 1997b). Parental and student choice is often based on views of "reputation" which in turn are related to the socio-economic and ethnic groups served—or visible—in the school. Low-decile schools (many with high Māori enrolment) suffer in this comparison. Analysis of roll changes in Auckland, Christchurch, and Wellington between 1991 and 1996 shows that low-decile, high-Māori-enrolment schools were most likely to lose students, even after population changes in the local area were taken into account (Ladd & Fiske, forthcoming). Schools may therefore be cautious about embarking on programmes specifically for Māori, particularly those who feel in most competition with other schools, or schools of higher socio-economic decile.

Parental choice has also "creamed" students from homes with better income or education from low-decile schools, making it even harder for these schools to offer students the balanced mixture of peers which helps student achievement, and removing potential sources of trustees, expertise, and support (Ladd & Fiske, forthcoming). Much of the "reputation" of higher-decile (lower-Māori-enrolment) schools is in fact owed to the "peer effect" (Wylie, 1998).

The Smithfield study of school choice also showed that Māori and low-income students had a lower rate of acceptance to higher-decile secondary schools, even when their prior achievement was as high as accepted students (Watson, Hughes, Lauder, Strathdee, & Simiyu, 1997, pp. 97–98). Māori and Pacific Island primary school students were more likely than others to be attending a school that was not their parents' first choice (Wylie 1997b, p. 158).

Increased competition between schools which comes with school self-management does not appear to yield benefits for Māori students, but may act instead to narrow their educational opportunities.

Other Indicators of School Responsiveness to Māori

The guide to the National Education Guidelines (Ministry of Education, 1997), which sets out the legal obligations of boards of trustees in 1993, reminds boards of their legal requirement to “seek and consider the concerns of Māori in the community”.

Yet consultation with schools’ Māori communities has decreased since 1990, even for high-Māori-enrolment schools (Wylie, 1997b, pp. 107–8). Forty-nine percent of schools had no consultation at all with their Māori community in 1993 and 1996. Only 46 percent of trustees from high-Māori-enrolment schools thought their school’s methods of consultation with Māori had been generally successful (p. 108).

Most of the professional staff development related to the Treaty of Waitangi and Māori issues came in the first two years of the reforms, when charters were to address the Treaty, and training funded by the Ministry of Education was available (p. 64). Few principals and trustees had training in the Treaty of Waitangi in 1996 (5 percent and 9 percent respectively), and few identified it as a priority (8 percent of principals, and 7 percent of trustees).

Most principals are confident they have satisfactory access to advice about the Treaty of Waitangi (62 percent; 17 percent unsure, and 20 percent dissatisfied), and Māori issues (59 percent; 15 percent unsure, and 24 percent dissatisfied) (p. 76). High-Māori-enrolment school principals were more confident about the quality of the advice available to them on Māori issues.

While 65 percent of Māori parents responding to the 1996 NZCER survey had some involvement in their child’s school, they had less involvement in their child’s school than non-Māori parents over the period of school self-management. They were more likely to say they were not comfortable in the school, had not been asked to help, or would prefer to let the school get on with the job of education (p. 96). Māori parents were more likely than non-Māori to have an issue they would like to raise with their child’s teacher, but would not feel comfortable talking to them about, and were marginally less happy with the general quality of their child’s schooling (p. 103).

Despite the requirements of the National Education Guidelines, school self-management on its own shows no overall increase in school responsiveness to Māori students, nor does it increase the involvement of Māori parents in their children’s schools. Central goals and requirements can be difficult and costly to hold schools to. Because bulk funding simply intensifies school autonomy, the trends observed in the first decade of school self-management are therefore likely to remain unchanged, at best. This indicates that bulk funding on its own is likely to make no positive difference to Māori students’ participation and achievement, or improve the inclusion of Māori parents and communities in schools.

Education Review Office Concerns

The Education Review Office has also noted concerns about school responsiveness to Māori in its annual reports for the 1996–97 and 1997–98 years. These include:

- The quantity and quality of Māori language and tikanga Māori programmes “has not expanded over time as extensively as other areas of the curriculum. The lack of language teaching expertise is a crucial factor in this lack of growth.” (ERO, 1997, p. 14)
- Most kura kaupapa Māori are too small to attract experienced immersion teachers or principals. “Staff often lack management and teaching experience or are untrained.³³ In some kura, remoteness may act as an additional barrier to recruitment.” (p. 14)

³³ Kura kaupapa Māori are exempt from the requirement to hire only registered teachers or people with limited authority to teach.

In kura with inexperienced staff, the ability or inability of these staff to manage the workload, to develop appropriate immersion teaching and learning resources, to deliver the curriculum in accordance with the *National Education Guidelines* and to meet the expectations of parents are real issues that affect adversely the quality of the learning experience for children. (p. 14)

- Inexperienced staff also lacked “familiarity with or expertise in immersion pedagogy” (ERO, 1998, p. 26).
- Half the 33 kura kaupapa Māori reviewed in 1997–98 were to receive follow-up visits from ERO. These follow-up visits are done only where there are substantial concerns. This rate of revisiting is substantially higher than the national rate of around 15 percent.

Summary

Over all, the move to school self-management shows few gains for Māori, and some losses. The benefits for Māori over the last decade have come from increased resourcing for Māori initiatives; little improvement seems to have come from shifting responsibility for responsiveness to Māori students to the school level. The key issues of resourcing and the availability of qualified staff fluent in Māori identified by Māori educators in the early 1990s (section 2) remain. Bulk funding, which intensifies school self-management and responsibility at the local level, appears unlikely to allow these issues to be satisfactorily addressed.

4. EDUCATION ISSUES IDENTIFIED BY MÄORI

In 1991 and 1992 several analyses by Mäori of the likely impact on Mäori of bulk funding were made; none has been published since. These analyses incorporate or build on the analyses made in the wider education sector. They also address issues arising from the Treaty of Waitangi which are of central concern for Mäori educational aspirations.

Education Reform Issues Identified in 1991

In 1991, Joe Harawira, speaking for the Raukaumanga School board of trustees, the then teacher advisers on Mäori education, and his whanau, identified a number of issues concerning Mäori at an NZCER conference which brought the education sector, politicians, and policy makers together to discuss the impact of the new system which began with Tomorrow's Schools (Harawira, 1991). Most of these issues remain current, though some progress has been made (see section 3). These issues are:

1. Involvement in their school by Mäori parents or community was often token only. Many boards had at most one or two Mäori trustees, who could not advance Mäori-identified issues on their own.
2. There was little evidence of increased regard for the particular needs of Mäori children. Suspensions and expulsions of Mäori children had increased since the shift to school self-management. Mäori-language-factor funding was not always used for that purpose; such funding should be targeted to immersion and dual-medium programmes. The amount of funding provided by the Mäori-language-factor funding was too limited to support teachers and resources.
3. High-Mäori-enrolment schools had fewer people in their community with the skills of the kind needed by self-management, and essential if bulk funding were to be introduced, such as financial management and industrial relations expertise.
4. The disparity between schools' ability to raise funds locally was growing, and reflected disparities in their school communities.
5. High-Mäori-enrolment schools were often in low socio-economic areas, with higher turnover of staff. This took additional staff time and funding to find replacements.
6. Demand for trained Mäori-language teachers outstripped supply. Replacing and finding teachers took additional school time and money, including translation and advertisements in two languages.
7. The number of Mäori teachers and principals was still grossly insufficient to match the number of Mäori students.
8. Resources available in Mäori were also grossly insufficient. While Learning Media had a policy of producing 15 percent of its resources in Mäori, many of these were for taha Mäori, and of "little or no use in bilingual and immersion programmes" (Harawira, 1991, p. 39). Schools were left to make their own resources, giving additional workload and financial costs compared with mainstream schools.

9. If bulk funding was introduced, these issues would be exacerbated for schools with high Māori enrolment. In particular:

- high-Māori-enrolment schools would still face additional workloads compared with other schools;
- schools with more money, and more local funding, could offer teachers better salary and conditions than others, so disadvantaging schools with high Māori enrolment;
- additional funding would be needed for kaiārahi reo, kaiāwhina, and resource teachers of Māori language;
- immersion and dual immersion schools needed additional resourcing anyway;
- bulk funding would probably lead to school-based industrial negotiations, and individual contracts—

How will the cultural concept of whakaiti translate in terms of the ability of Māori teachers to negotiate salaries? Will they be disadvantaged and will this have an impact on the retention of Māori teachers in the long run? Schools run on a whanau kaupapa will be compromised by the imposition of salary negotiation under the [Employment Contracts] Act. In such schools group or whanau concepts are integral and include staff. The promotion of individualism and competition are in total opposition to the whole school concept and is likely to divide the whanau and negate co-operation. (Harawira, 1991, pp. 40–41)

- there would be no accountability to ensure that boards paid more attention than they had (or rather, had not) to Māori children's needs—

Tino rangatiratanga is about doing it our way, and by us. But we need the funds and resources to help create a level playing field whereby we can manage our kaupapa ourselves, and in doing so, succeed in producing a system that finally is successful for Māori. (p. 42)

Te Pūtea Māminga Ki Nga Kura

In 1992, the New Zealand Educational Institute (NZEI), the early childhood education and primary teachers' union, published a bilingual report, *Te Pūtea Māminga Ki Nga Kura*—

. . . to provide Māori communities and schools committed to developing Māori education programmes,³⁴ with a report that gives information about bulk funding and its impact on Māori education. (p. 2)

The report was spurred by a hui of Māori educators across the education sector which focused on funding for Māori education in schools. This hui raised a number of concerns about bulk funding. These included:

- difficulty of expanding Māori education without targeted funding, and
- additional workload and stress.

³⁴ The report does not specify "Māori education programmes"; it makes references later to both kura kaupapa Māori and mainstream provision.

The report also records opposition to bulk funding from a 1991 hui organised by Manatū Māori (the then Ministry for Māori Development), which brought together representatives from Manatū Māori, Wahanga Māori, Runanga Matua, Ministry of Education, Māori primary and secondary principals, NZEI, and NZPPTA (New Zealand Post Primary Teachers' Association). Opposition to bulk funding was mainly on the grounds that it did not represent partnership under the Treaty of Waitangi, and would have negative impacts on Māori learners and communities (NZEI, 1992, p. 4). The hui concluded that Māori would gain more by policies which focused on adequate resourcing for Māori education.

An analysis of bulk funding by the Māori Education Authority taskforce of the National Māori Congress also warned against its introduction, seeing no gain in exchanging one underfunded system for another (p. 4). The taskforce stated that kura kaupapa Māori would face additional risks:

The carrot for the market forces argument is devolution supposedly of control so that decisions can be made by those who are most closely affected by them. The hidden price is the possible removal of government responsibility for any worsening of educational achievement for Māori as the resource base continues to shrink. *In such a climate if under-resourced Kaupapa Māori schools fail to meet the needs of the children then parents and children will vote with their feet and support other options. Arguments about the effectiveness of a Kaupapa Māori education can be raised and its future put in jeopardy.* [emphasis in original] The same will not be true for mainstream education which has the built-in safeguard of an articulate and well resourced middle and upper income bracket whose interests are at one with those of the state and government. (p. 5)

Key Māori Education Issues

In this report, bulk funding was described as a cost-cutting exercise that did not address the key issues of Māori education, namely:

- the need to increase the number of fluent speakers,
- the need for more resources in Māori,
- the need for better Māori participation in decision making, and
- the need to improve Māori achievement throughout the education system (NZEI, 1992, p. 2).

Bulk Funding and Treaty of Waitangi Undertakings

A key point of the report is that—

. . . as with most changes that have flowed from Tomorrow's Schools . . . government has failed to include Māori in the debate about the bulk funding of teachers' salaries. (NZEI, 1992, p. 2)

Another key point made by the report is the absence of any publicly available analysis done in the course of developing the bulk funding policy of the potential impact on Māori.

While the report noted that "because Māori are coming from a base of poor levels of funding, the short-term gains look attractive" (p. 2), the long-term cost would be an increase in government control of schools and a capping or deterioration of funding.

Under bulk funding, government makes the decisions about what is an appropriate level of funding. Māori are excluded from that process. That is not Tino Rangatiratanga. (p. 8)

In the long term, there will be no benefit for our tamariki and mokopuna, and Māori aspirations for Tino Rangatiratanga in the education system will remain as dreams. (p. 3)

5. BENEFITS AND RISKS FOR MÄORI OF BULK FUNDING

None of the recent bulk-funding policies reduced funding for those schools which took part.³⁵ The TSG, DRS, and FFO were all optional, not mandatory. The material available on the impact of these policies therefore paints a more sanguine picture than that arising from situations when bulk funding has been accompanied by static or declining funding (the historic example of the turn of the century in New Zealand primary schools, recent experience in other New Zealand education sectors, or the parallel English reforms), or where it has not been optional.

As described in Section 4, schools with substantial proportions of Mäori students already face additional costs to other schools, and more challenging tasks. It therefore seems likely that any reduction in the levels of existing government funding to these schools would have an adverse effect on Mäori, whether the schools are Mäori or English medium.

It is difficult to tell from the data available on TSG, DRS, or FFO if schools have become more responsive to Mäori students. The material available suggests that mainstream bulk-funded schools have given them no more priority than non-bulk-funded mainstream schools, despite National Education Goal 9:

Increased participation and success by Mäori through the advancement of Mäori education initiatives, including education in Te Reo Mäori, consistent with the principles of the Treaty of Waitangi.

The analysis below assumes that bulk funding would follow the most recent bulk funding model, FFO, that is, that schools would receive more money over a three-year period, that the formula would be calculated at the top of salary rates rather than average rates, that guarantees that no school would be financially disadvantaged during this period (despite roll drops) would continue, and that school funding was not cut back in this period.

The benefits outlined below depend on bulk funding providing schools with additional funding. However, additional funding could also be given to schools without their having to become bulk funded. It could also be given in ways which target Mäori students more, or provide better accountability for improving the quality of Mäori education.

Likely Benefits for Mäori in English Medium Schools

- As for other students in these schools, benefits for Mäori from additional funding allow increased staffing and more individual attention to Mäori students, professional development of teachers (since teacher quality and adequate training are among the keys to student achievement), and new programmes to meet student needs.
- The size of the benefits for Mäori students will depend on the nature of a school's staffing decisions, the quality of the teachers employed, their ability to be responsive to Mäori students' needs, the professional development undertaken, and the quality and appropriateness to Mäori student needs of any additional programmes.

³⁵ Full funding is not a capped funding pool.

Likely Risks for Māori in English Medium Schools

- Bulk funding is likely to lead to greater employment of untrained and beginning teachers, on short-term contracts (see table 2). Untrained staff—whether Māori or non-Māori—are less likely to be effective for Māori students than fully trained staff, particularly in core curriculum areas.
- The extent to which the desirable balance between beginning and experienced teachers is able to be sustained in schools will depend on many factors, including the availability of teachers, and staff morale. Higher class sizes and lower staff morale are not conducive to providing Māori students with support and attention. The introduction of site-based employment contracts may lower staff morale, particularly if such contracts introduce different conditions in different schools, and if teachers feel differently rewarded for similar contributions to the same school. Lower staff morale is unlikely to provide a supportive environment for Māori achievement.
- If rolls drop and schools have to make savings, the number of teachers, salary levels, and employment conditions are likely areas where boards or principals will try to make savings.
- An increase in the employment of teaching staff on short-term contracts may lead to a decrease in staff continuity. Continuity is important for Māori children as well as the school, particularly in terms of the pastoral dimension.
- The evaluation of the TSG trial indicated a tendency for principals to assume more authority. This might make it even more difficult for Māori trustees to seek better provision for Māori students. If the board of trustees also had to take on full financial and employer responsibilities, including the negotiation of site-based and individual contracts, there could be a deterioration in relations between boards and staff. This could make the role less attractive for Māori, particularly where Māori trustees and staff have been able to provide each other with mutual support, and work together to support Māori students. This could lead to less responsiveness to Māori students' particular needs.
- Bulk funding also seems likely to lead to problems in schools which do not have financial and industrial relations expertise on their boards, particularly if employment contract negotiations are shifted from the national to the individual school level. Many such schools are low-decile, small, or rural, and more likely to have high Māori enrolment. These schools will face additional expenses getting expert advice and services. They may also be in greater danger of getting into financial difficulty.
- Schools seem unlikely to improve their provision for Māori students unless Māori form a critical mass in the school. Bulk funding is even less targeted than existing funding arrangements. The recent changes to the national administration guidelines should provide a useful accountability mechanism to ensure that schools show that they are making a difference for their Māori students; the actual impact on school practice and student outcomes will need careful monitoring. It may prove difficult for schools with few Māori students to analyse their progress separately and robustly.
- While there is a critical mass of Māori students in high-Māori-enrolment schools, those schools are far more likely than others to suffer roll declines or roll volatility (Fiske & Ladd 2000;

Wylie 1997b, p. 154, Wylie 1999, p. 155-159). This means a long-term erosion of their funding, pressure to amalgamate or close, and erosion of their ability to cater adequately for Māori students.

Primary school rolls are estimated to peak nationwide around 2002, and then decline; intermediate and secondary school rolls will start to decline around 2010. Most schools will face roll and therefore funding drops; they will also be competing more with each other for students and for suitable good-quality staff. School closures, amalgamations and clustering are likely. In such environments, high-Māori-enrolment schools will be placed in a losing (if not a no-win) situation, with even greater “creaming” of students and their whanau from the school community, and overall roll losses which make it even more difficult for schools to provide Māori students with the quality of education they need. They could also face greater competition for good-quality staff, with higher-decile schools which can draw additional money from their parents and communities able to offer Māori teachers better salary and conditions, in less demanding circumstances.

- It is likely that in some areas, schools will be encouraged to form clusters to overcome financial and other problems arising from size, the nature of the students served, or the lack of expertise on boards. This has occurred for some schools on the East Coast, as part of the Whaia te iti kahurangi initiatives to revitalise Ngati Porou and East Coast education. The Southern Cross campus brought together primary, intermediate and secondary schools, easing transition between different levels.

Clustering can have advantages for Māori students if it enables more effective use of resources, and more attention to students' needs. It may make it more difficult for Māori students to receive particular priority if schools with high Māori enrolment become clustered or amalgamated with schools of low Māori enrolment.

- While such clustering may allow cross-subsidisation between schools, the self-managing schools approach has encouraged competition and self-regard by schools. It is likely that schools which felt their rolls were subsidising others would resent that situation, and make it difficult for cross-subsidisation at realistic levels for schools with high Māori enrolment to occur.
- It is difficult for bulk funding on its own to address the underlying problems associated with improving Māori access to te reo Māori, or enhancing the language, and boosting Māori pride and communities. These underlying problems include a lack of properly qualified Māori teachers proficient in the Māori language, high turnover rates of such teachers, and a lack of appropriate Māori-language resources for all curriculum areas, at all schooling levels. Individual schools can do very little to increase supplies in these areas. Clusters of schools could have more success, but the clusters would need to be large, linked with tertiary providers of good quality teacher education, and receive additional resources to enable them to encourage would-be teachers, support them financially while training, and retain them after training. Central initiatives would continue to be needed.
- Nor does bulk funding improve the non-school-related, socio-economic factors which impede Māori educational achievement (e.g., Chapple, Jefferies, & Walker, 1997).

Likely Benefits for Māori in Māori Medium Schools

- Where rolls are stable or increasing, any additional funding may enable the expansion of immersion programmes, and may enable the employment of properly trained and experienced teachers, where they are available.
- Any substantial additional funding may allow the expansion of Māori medium programmes of good quality, which would enable more Māori students to pursue this option (demand is currently greater than supply), though extra funding would be unlikely to fund both capital and teaching staff expansion. However, central initiatives appear more likely to increase the supply of properly qualified teachers for which there is also greater demand than supply.
- If bulk funding money enabled expansion of good quality Māori medium schools, there should be an increase in the number of fluent and confident Māori speakers of te reo Māori. This would benefit all Māori, and would make it more likely that te reo Māori could resume its status as a language of everyday use in Aotearoa.

Likely Risks for Māori in Māori Medium Schools

The likely risks are the same as for those served by English medium schools, with these particular differences:

- Changes to the role of board or principal which lead to school-site industrial arrangements may be particularly risky for Māori medium schools, which generally prefer to take a more inclusive approach. Staff may feel excluded, and less willing to give as much as they do at present.
- The quality of Māori medium schools varies. It is important that Māori parents perceive them to offer good quality education if they are not to suffer roll volatility or roll drops.

Can Bulk Funding Reduce Disparities?

If bulk funding brings additional resourcing, it may help reduce the size of the achievement gap for Māori, *if* it is directed at improving outcomes for Māori. Untagged funding, however, does not make schools any more accountable for Māori achievement than they are at present. But tagged funding is counter to the rationale for bulk funding, which would make it less feasible as a policy lever if all schools were bulk funded.

Nor does bulk funding address more fundamental issues such as teachers' lack of experience in using assessment data to diagnose student learning needs, or their ability to respond to students in terms of their ethnic or cultural identity.

There is likely to be a higher chance of reducing the disparities between Māori and non-Māori through curriculum support and centrally produced resources, through the initiatives from the literacy and mathematics taskforces, and through the development and communication of useful and appropriate activities for parents to use at home.

Accountability requirements have also been strengthened with the inclusion of more specific requirements in the National Administration Guidelines to use assessment practices to identify students and groups of students who are not achieving, or at risk of not achieving, and develop and implement teaching and learning strategies which address their needs. The policies, plans, and targets for improving the achievement of Māori students are to be developed in consultation with the school's Māori community, and made known to the school's community. These requirements

are to be fully implemented in schools by the end of term 2, 2001.

The success of this strategy will depend on the weight of this particular strengthening in Education Review Office accountability reviews of schools, the quality of school consultation with its Māori community, and the nature of schools' plans and programmes.

These disparities between Māori and non-Māori took time to develop; they will take time (measured in decades, or another generation or two) to disappear.

Can Bulk Funding Develop Distinctively Māori Compulsory Education Contexts?

Again, if bulk funding brought additional resourcing to distinctively Māori education contexts, it might help, depending on what the money was used for. Central initiatives to develop and expand a well-qualified Māori teaching force, and expand Māori-language curriculum resources might be a much more effective use of any additional government money than distributing it to individual kura and schools with immersion or bilingual programmes, on a per student basis as in bulk funding.

CONCLUSION

- Bulk funding can theoretically benefit Māori through:
 - increased funding at the individual school level, for those schools which stand to gain through the formula used.
 - the use of that funding to focus on Māori student progress or to provide or improve education through the Māori language.
- However, increased funding at the individual school level, for a minority of schools, does *not* address some of the fundamental issues which lie behind the disparities for Māori, and the obstacles in the way of (re)creating distinctively Māori educational contexts of good quality. School self-management, of which bulk funding is seen by some as a key part, has shown little ability on its own to erode these disparities and obstacles.
- Māori are likely to make gains where additional funding can be targeted, with accountability so that schools focus on Māori children.
- Gains have also been made by central moves to improve the infrastructure for schools, through increasing relevant curriculum resources, and the supply of properly trained Māori teachers proficient in the Māori language.
- At the same time, in the overall picture, we see:
 - no gains from school self-management in the retention of Māori students in schools,
 - no gains in Māori students' achievement,
 - an increase in suspension rates, and
 - an increase in the disparities between the schools available to Māori students and those available to others.
- It is not yet clear from the existing studies on bulk funding whether the further extension of school self-management through the additional money and small additional flexibility of bulk funding has meant that bulk-funded schools have been able to better respond to local students needs and to Māori students.
- As with any school, sustained effort over time is needed which focuses on student learning and engagement in school is needed to make a positive difference for Māori students.

The school improvement research literature emphasises the importance of outside support and interest, the core focus on student learning rather than administration, professional development, time for collegial work to analyse, plan, and review, and not taking on too much at one time. The initial evaluation of the Strengthening Education in Mangere and Otara (Timperley, Robinson, & Bullard, 1999) also notes the importance of focusing on what is done in core programmes, rather than continually 'adding on' new packages or approaches.

A more analytical approach, making more use of assessment data to analyse student learning needs, translate these into actions, and review the results of the actions, is also recommended in the school improvement literature. This is the substance of the revision to the National Administration Guidelines, which should see all schools adopt this approach for their Māori students. Over time, this should result in gains for Māori students. Schools will need outside support to develop and embed this new approach (for many) into their work.

Activities that engage students, useful feedback on work, opportunities to show a range of skills, and positive interactions between students and teachers which are respectful of students are also important for Māori students (McKinley, 2000).

- However, some of these aspects continue to depend on central initiatives and support. In particular, for Māori-language schools, there is a need to further improve the infrastructure available for schools. This includes access to advice, access to a good pool of well-trained teachers, access to relevant and useful curriculum resources and student assessment tasks, and ways in which successful initiatives can be shared between schools.
- Until recently, the self-management of schools has been given more emphasis than co-operation between schools.

The Ministry of Education is currently piloting geographical clusters of schools in different parts of the country, particularly in rural areas. These clusters have been given additional resourcing to enable them to share administrative support or professional development. Evaluation of these clusters is under way; anecdotal reports are positive, but note that this additional funding is key to sustaining the clusters. No information is available on the cost-effectiveness of the clusters.³⁶

Partnerships between the Ministry of Education and Ngati Porou, Tuhoe, and Te reo o Tai Tokerau have been developed which focus on iwi-developed education plans. These could form the basis for a greater sharing of resources between schools, professional development and development of curriculum and other initiatives to meet the needs of students from the iwi which should improve the quality of education, and educational achievement. All these partnerships are in their early days.

There are also a number of national organisations which bring particular types of English-language schools together, such as the Decile One North Island Schools, and the Normal Schools association. These can be vehicles for focused professional development, as well as representation of school interests. To date, there has been no sharing of resources.

Te Runanga o nga kura kaupapa Māori has gone much further, offering tuakana-teina relationships between existing kura and those setting-up, including the sharing of resources, by operating the newcomer as a satellite of the existing kura. However, all kura continue to operate as individual entities.

- This report has considered the likely impacts of bulk funding within existing frameworks, that is, the continued use of individual schools as the “building-blocks” and units for funding and management arrangements. It has not considered what it might mean for Māori if bulk funding were to go to units other than schools, such as iwi, Te Runanga o nga kura kaupapa Māori, or a Māori Education Authority. Such an analysis would need to consider some complex issues. These would include:
 - whether larger units could achieve real savings which could be ploughed back into improving teaching and learning;
 - infrastructure issues, such as teacher and curriculum resources supply (quantity and quality);
 - viable funding levels;
 - accountability issues, and
 - the relation of Māori medium and English medium education.

³⁶ There is growing interest in bulk-purchasing; NZSTA has developed such a scheme to reduce schools' electricity and other costs.

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