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**WHAT DIFFERENCE WILL THEY MAKE?**

**A study of equity policies in contributing primary schools**

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**A thesis submitted in partial fulfilment  
of the requirements for the degree of Master  
of Educational Administration**

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**Abstract**

This study investigated the writing of equity policies in ten contributing primary schools, both rural and urban. These policies are at present a compulsory feature of all school charters which boards of trustees are required to complete. Seen in terms of the larger ideological, political and economic agenda on which the educational administrative reforms in education in New Zealand are based this study draws on theories of the state and cultural reproduction to explain the attitudes and actions of boards of trustees.

Forty interviews were conducted with boards in ten schools. These interviews canvassed the policy writing process, personal knowledge and training received for both equity and policy writing, as well as the relevance that particular policies have in schools.

Equity is about values, while present policy writing processes used in schools are based on management systems. This study concludes that while writing equity policies can be made compulsory, if boards' understandings are not complete, if the charter language used is inhibiting and the purposes of the policies are in conflict with trustees' own personal beliefs, then the exercise is meaningless and will have little effect on our schools.



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## 1 Equity policies in rural and urban contributing primary schools

### An Introduction

*"In our children lies our future. The education they receive shapes them individually and as members of a larger society. Our children will not receive the education to which they are entitled unless our administration is effective. That is why the Government has given priority to administrative reform in education." (Lange, 1988, piii)*

*"The role of Government has been reassessed as part of the overall economic reforms. In the area of education this has meant decentralisation. More power and responsibility will rest where it is best utilised, at the local level. In some cases this also means that private agencies will take over some service roles previously held by Government. In other cases, Government will continue to guide, and to deliver services.*

*"At the base of the reform process are important considerations; the enhancement of the family unit, the principles of the Treaty of Waitangi and the encouragement of equity. The new structures for education administration will reinforce these." (Ballard, 17 May 1989.)*

In 1991 it became compulsory for all state and integrated schools in New Zealand to write and implement equity policies derived from the school charters. While the present National Government has foreshadowed changes to the National Education Guidelines which form the compulsory aspects of the charter, under the existing legislation boards of trustees are required to complete this task. Some boards have difficulty in writing equity policies because they lack both the experience in policy writing and the information about, and conception of, the policy area itself. For many trustees, the formal language and reading involved is inhibiting. Finally, this is an imposed task for them. This research proposes to compare the development of equity policies in a selected group of rural and urban Canterbury schools. It will explore the way

boards wrote their policies, whether they consulted their communities, how they explored the literature and how they became more familiar with the policy intent.

Equity policies within the charter are designed to ensure equitable outcomes for all students regardless of gender, ethnicity, religion, family and class backgrounds. The curriculum is to be non-sexist and non-racist, and any disadvantage experienced at school is to be acknowledged and addressed. These policies also require that suitable role models are provided so

*"children can understand the meaning of equity in behaviour they observe from day to day." (Charter Framework, 1989,p11.)*

Learning is also to be enhanced by policies which aim to eliminate any sexual harassment of students, parents, or staff members in the school. (Appendix 3 Charter Requirements.)

#### **The research objective**

To examine the development of equity policies contained in school charters in urban and rural Canterbury schools.

The equity provisions contained in the New Zealand educational reforms are part of a larger ideological, political and economic agenda which advocates a minimal role for the state. Boards of trustees are part of the wider society which has been affected by the new agenda. The devolution of power from central bureaucracy to individual boards must be seen in this context. However, boards all have their own commonsense understandings of race, class and gender issues and this in turn has brought, and will continue to bring, differing responses.

The interest, educationally, will be generated from the successes or otherwise that these new policies have. If equity policies work then Maori and Pacific Island children will experience a success that has hitherto eluded them. Children with special needs (including the gifted and the disabled) will also find a greater recognition of their needs. All students with special learning needs will be catered for, as far as staffing and funding permit. The education of girls will also receive greater attention as will the importance of providing appropriate role models. Legislation also requires that sexual harassment policies be in place by 1991. Many schools, particularly single sex schools, consider this type of policy unnecessary. Inappropriate behaviour will need to be more closely monitored as an awareness of the unacceptability of sexual harassment grows.

On another level, there will be interest in the tension which occurs between compulsory equity on one hand, and the notion of free choice on the other. Policies of consumer choice, which are evident in education legislation and school selection, conflict markedly with compulsory equity policies that require successful outcomes for all students. Both these types of policies have come from the Labour Government which set the reforms in education in motion. In 1990 the Government changed and policies which reinforced the notion of free choice have been spelt out in the latest Education Amendment Act 1991: schools may now set their own enrolment and selection policies, and Community Forums are no longer prerequisites for schools wishing to recapitate or change their status. The spirit of this latest legislation is in marked contrast to the earlier Education Act which embodied the new reforms. The 1989 Education Act requires boards (as a legal undertaking) to have an approved charter. (Section 64.) This particular piece of legislation also required that boards consult parents and staff before seeking approval or amendment of their charter. (61,3.) For boards who fail to

develop a charter of their own, in terms of this Act they are deemed to be chartered. (Section 61, 12.) This means that the compulsory sections of the charter are legally binding on all boards because charters are still legally required. There is thus a significant difference in both spirit and intent between these two pieces of legislation. On one hand the 1991 Amendment Act endorses minimal state intervention and maximum individual choice, while on the other the earlier legislation requires compulsory charters and consultation with parents.

The approaches that boards adopt in writing policies, and the impact of them, will be in some measure constrained and influenced by the legislation as well as by prevailing attitudes and notions about equity. However, there will also be interest in the extent to which boards consulted their communities and involved parents and teachers in the policy writing process. It would be useful to ask boards how representative they feel they are of the communities in which they live.

#### **Tentative theory, solution, answer or hypothesis**

It is expected to find that:

- \* equity practices will be unacceptable in some rural districts;
- \* what people write in policies may not be in harmony with their personal beliefs;
- \* some policies will be more difficult to accept than others. Sexual harassment, as an issue, tends to be avoided by many schools. The provision of suitable role models occasions anger with some boards because it

disturbs the notion that what they are already practising is acceptable;

- \* there will be significant differences in understanding equity between rural and urban schools;
- \* in most schools a gap will occur between the rhetoric of the policy and programme practice;
- \* policy writing will be difficult for some boards. Some boards have copied the policies of others rather than write specific ones for their own school. As a result, there may be policies in schools which do not suit the needs of those schools.

This study will seek to uncover the individual attitudes of board members towards equity policies. In addition, it will look at the approaches they took in writing and formulating them.

### **The approach**

There are two levels to this investigation. At the national level there is a Government with executive legislative powers. Equity is affirmed within law. Although this has changed recently with the repealing of the Pay Equity legislation (December 1990), and the new Minister of Education indicating changes to come in making equity optional in school charters, the fact remains that 93% of charters had been signed by July 1991. (Ministry of Education 1991 July National Operations Statistics.) The Ministry of Education is required to put governmental policies in place. The previous Labour Government had made equity goals and objectives mandatory within schools' charters and although the new National Government has



signalled that changes are to come in the charters making equity voluntary, they have not yet occurred. Therefore within an investigation at a national level it will be necessary to review the changing role of the state and how attitudes towards equity are affected within this framework.

At the second level, boards of trustees are required to write equity policies for their schools. It is here that Gramsci's concept of hegemony as outlined in Apple's Education and Power will provide a useful theoretical base from which to explore these issues. The school as a hegemonic institution reproduces the dominant culture, and the equity policies as prescribed within the charter could produce significant tensions for boards. Consultation is to take place both within the school and the community before these policies are written. It is now that the paradox of decentralisation and central control emerges. Boards are empowered to govern the school but there is a firm framework which is controlled from the first level. Through funding controls and National Education Guidelines, the state, as the first level, controls boards, allowing them to work only within specified frameworks. The state therefore desires that "consensus" will be reached through these "unifying principles". (Apple, 1982, p82.)

It is here also that exploration of theories of cultural reproduction which demonstrate

*"the structuring processes of race, class and gender" (O'Neill, 1990, p91.)*

will provide further explanations for the individual responses that boards make.

Schools are to write and implement the programmes which stem from the equity policies. It is here that much depends on information flows within communities and the people included and excluded. The location of schools in

certain areas as well as the advocates who are able both to lead and to push perspectives provide the independent variables. Using a critical theory approach as suggested by Prunty in Signposts for a Critical Educational Policy Analysis these aspects can be investigated and new theory validated within

*"an ethical and political framework of social justice." (Prunty, 1985, p133.)*

Writing equity policies in schools will be completed in 1991. However, what is written in these policies may be neither believed nor observed in action.

#### **Rationale for research topic**

As a liaison officer for the Ministry of Education in rural and urban schools a significant part of the researcher's duties involved working with boards of trustees. The majority of work done during 1990 and early 1991 has been in charter development and the encouragement of policy writing to meet the goals and objectives contained within the charter. By and large most boards have started to write their equity policies, but some, particularly in rural districts, have shown resentment about this. Many of these boards considered that these policies only reflected 'social engineering' (their phrase) by the then Labour Government, and they are therefore reluctant to write and implement them. Their reluctance stems in part from the imposed nature of the task, but more significantly because they simply do not see the need.

Since the inception of the Ministry of Education in 1989, liaison officers in the Canterbury District have worked with boards to explain the purpose of writing equity policies and to assist with interpretations of equity. In a series of seminars which were conducted on request, liaison officers made available prepared materials. These

were merely starter kits designed to get discussion about the issues under way. At no time were designer policies given or schools influenced to go about the task in a particular way. Instead the emphasis was always on encouraging each school to review how they were addressing equity in their schools, and then suggesting that they move on to where they would like to be. It has proved to be a challenging time for all concerned. Some boards have limited perceptions of equity, and have felt threatened because the compulsory writing of policies is challenging long held value systems.

The reforms within our schools in New Zealand since 1989 have had considerable impact. During 1991 and 1992 it is expected that the written policies will be translated into programmes within schools. Boards, teachers and communities have wrestled with policy development and therefore the practical applications of equity policies should be visible shortly, if the charter's goals and objectives have been met.

Liaison officers have had to become more knowledgeable about equity issues relating to class, race and gender. In turn they have had to defend the need for these policies and assist boards to interpret the issues. Working with boards as they discussed the issues has made Ministry officers increasingly aware of the wide-ranging views which are held in society.

Some boards within the area chosen do have firm ideas about equity. They are particularly concerned about the impact of a curriculum which seeks to achieve equitable outcomes for all students. This view stems from their notion that everyone has an equal chance anyway, and that these policies will reduce the success rates of above average students therefore these policies are not needed. A few boards have expressed strong reservations about the emphasis on a non-sexist curriculum. They do not see the

point of these policies and wish matters to remain as they are at present. Underlying these concerns is a deep-rooted antipathy towards the Treaty of Waitangi.

#### **Interest and relevance of this research**

It is hoped that this topic does have interest and relevance for other educators and administrators. If the charter intentions are to succeed, programmes within schools will come from the written policies leading to changes in practices. The charter specifically prescribes certain actions boards must undertake. While it is known that attitudes of families and teachers are very influential in the formative years, the effects of compulsory equity policies should add another dimension to students' development if they are implemented fully. Equality of opportunity was supposed to underpin the curriculum. However, studies reveal that many students do not achieve in schools. (Lauder et al: Towards Successful Schooling, Jones et al: Myths and Realities: Schooling in New Zealand.) These compulsory equity policies are a conscious attempt to improve the balance.

There is widespread and in-depth research on equity issues in schools and communities both in New Zealand and in other countries. However, the charter, its goals and objectives and its compulsory policy writing are part of the new reforms of education in New Zealand. Investigative research into the compilation and implementation of these compulsory equity policies in state schools has yet to take place. This research is limited to the compilation of equity policies by boards, the methods they used, their interpretations of equity, and whether they see their views as representative of the communities in which they live.

The topic is timely. It is acknowledged that many schools will, for the first time, be implementing equity

programmes, while others will be regularising and extending existing programmes. The attitudes of the communities through the elected boards of trustees will be influential in the acceptance or rejection of the new policies.

It will also be interesting to review the policy writing processes used by trustees in developing the new policies. This methodological approach to decision making within educational institutions is relatively new for New Zealand and is a requirement of the charter. Therefore, trustees perceptions of the writing process will impact significantly on their methods in the future to decision making.

While the literature will reveal the background and framework in which trustees work, it will be necessary to supplement this by asking boards about their own educational backgrounds and occupations in order to situate them within their communities. It is proposed also to ask trustees if their communities are fully represented on their boards, as well as the involvement in community affairs they each have. This information should prove useful in providing a backdrop, enlarged by the literature, of our trustees. It is intended that with this framework provided by trustees, data collected relating to the policy writing process together with their individual concepts of equity and equity policies will be studied to determine whether they support the researcher's original hypotheses.

## 2      The educational reforms, providing the framework: A literature survey

*"We must not overlook the fact that our education system presently serves some people better than others. We have much still to do to remove the barriers in front of some learners. We have much to do yet to achieve complete gender equity in education. We have much to do in Maori education. We also have much to do for Pacific Island and other migrant groups.*

*"In this brief the Ministry of Education has set out sixteen of today's key educational policy issues. Curriculum, assessment, equity, choice and parents' role in education figure prominently. So too do accountability and judicious resource use." (O'Rourke, 1990, p.ii.)*

### Introduction

New Zealand's boards of trustees are nearing their first term in office. The purpose of this literature review is two-fold: in the first instance it is to examine the influential forces which have contributed to the educational reforms in New Zealand; in the second, it is to consider the factors which have affected trustees in their approach to policy writing.

Devolution of responsibility to boards has changed the state's relationship with its educational communities. Therefore literature concerning theories of the state will be reviewed first before examining the specific literature which established boards and is still continuing to have an impact on their work.

Boards of trustees' attitudes towards equity will be affected by their own commonsense understandings. The literature pertaining to cultural reproduction theories,



particularly within the New Zealand context, will be reviewed to provide a view of another framework in which boards work. Attitudes which trustees have towards issues of gender, ethnicity, and class will, in turn, affect their approach to writing equity policies.

### Critique of literature

#### State theory

The dominant ideological rationale of present governmental reforms must be linked to the changing role of the state under the implementation of strongly monetarist economic policies. To understand the background of the reforms then, is to study the influential writings of educationalists, along with political scientists in the field both in New Zealand and overseas. Within the New Zealand context, Grace, Nash, Codd, and Harker have documented the background.

The ideology promoted in the past in New Zealand was that the state is neutral and beneficial while promoting social mobility and policies of public good. The state, thus provides an education which is neutral and beneficial also. (Beeby 1986.) The essence of these concepts was encapsulated in the now famous Peter Fraser dictum:

*"The Government's objective, broadly expressed, is that every person, whatever his level of academic ability, whether he be rich or poor, whether he live in town or country, has a right, as a citizen, to a free education of the kind for which he is best fitted, and to the fullest extent of his powers. So far is this from being a pious platitude that the full acceptance of the principle will involve the reorientation of the education system. (Fraser, 1939, cited by Beeby, in Renwick. 1986, p xxii.)*

The changing environment has seen the emergence of New Right monetarist policies which began with the last Labour Government. These monetarist policies are not new, having their roots in Hobbesian theory dating back to the seventeenth century. (Lauder, (1990.) Competition, choice and minimalist state are the basis of these beliefs.

This was the Labour Government's response to the deepening economic crisis which has subsequently flowed on into the social system and has now become endemic. (Habermas, 1973. Lauder, 1990. Codd, 1990a. Jesson, Ryan, Spoonley, 1988.)

Electoral support is needed to stay in power, and while the form of the state is determined through the rules of democratic and representative government, the economic policy of the state depends on continuous accumulation. The difficulty then arises of economic units within the state that do not operate in a commodity form to allow the accumulation to take place. (Offe, 1984, p121.) Until now schools have not been controlled by the market and therefore are not subject to the commodity form. ie turning schools into businesses. The attempts to stabilize and universalise commodity form through state policies can become a focus of social conflict and political struggle when there is resistance to this occurring. (1984, p129.)

However, to maintain legitimation, political systems need an input of mass loyalty, because failure to gain this while economic imperatives are carried out results in a legitimation crisis. (1973, p46) Capitalism is always in danger of crisis because of the contradiction between accumulation and legitimation within the system. The burden on the state of educational expenditure, together with the decreasing accumulation through taxes, led the last Labour Government to seek reforms in education which were not politically acceptable. Despite their attempts to prove that the reforms were about education, the electorate knew that the imperatives were economic in origin, not educational.



Neo-Marxist theorists Offe and O'Connor argue that the tension within the modern state has arisen between the contradiction of accumulation (our economic system), and the legitimation (our social system), and this consists of:

*"ambiguous political, economic, and social processes."* (O'Connor, 1984, p190.)

Within this neo-marxist framework O'Connor argues that the term "crisis" is part of a ruling class ideology because it legitimates demands by capital and state for a top-down reform of the existing economy, the political system and state, and social life. (1987, p125.) In the New Zealand context the crisis of education was used to mask the deepening economic crisis. (Grace, 1990. Codd, 1990a) The resistance to these moves has been noted in the press, and by union groups commissioning reports from academics to counter unsubstantiated remarks that education is failing. (Elley, 1991. Lauder, 1991.)

Gramsci's theory of state and particularly his concept of hegemony have been used by several writers to explain and interpret recent changes in education. Hegemony is a view of the world, the scope of which extends through social, cultural and economic spheres of society. Its effect will allow the dominance of one economic class over another into cultural permanence. Moral and philosophical leadership in society is gained by the active consent of the majority in that society. (Bocock, 1986, p11.)

The New Right movement which has several different ideological positions within it in New Zealand has placed much emphasis on the term "crisis" in order to gain legitimacy for reforms. When the Labour Government came to power in 1984 it quickly promulgated policies of monetarist reform which included a reduction of the welfare state, [placed] an emphasis on the freedom of the individual and devolved responsibility to the community. (Jesson, 1989.)

Within this framework the Treasury documents, Economic

Management (1984 and more significantly Government Management (1987) set the guidelines for recent educational reforms. In 1984 Treasury wrote about the establishment of an education system which would respond more quickly to Government's broader objectives and would be accountable under them. (p113) In the later blueprint for education reform Treasury argued that education was a commodity, (Grace, 1990, p29.) and that a state monopoly cannot be efficient in equity and efficiency for the diverse needs of children. (The Treasury, 1987, p138.) Indeed choice and control by families would achieve equity and efficiency goals particularly for disadvantaged groups. (p147.)

Criticisms of the Treasury stance and influence in the subsequent reforms have been trenchant and widespread. Grace said that the brief was an ideological document which reduced education to a commodity and this would now have significant consequences for the legitimate role of government. (1990, p29.) Lauder, Wylie and Parker-Taunoa noted that students were not consumers and society was not a mass of individuals but rather social classes, racial and gender groupings who had specific political and cultural interests. (1990, p7.) In the final analysis it was Codd who explained that monetarist policy has captured educational policy. (Codd, 1990a, p192.)

Since the new reforms have been implemented some of the tensions and contradictions within the new policies have been identified, in particular, the tension between choice and equity which may lead to a deepening legitimization crisis. (Codd, 1990a, p204.) In addition, the strengthening of state power and the devolution of responsibility, such as equity issues, to boards of trustees, illustrate the shifts in power which are taking place. (Codd, Harker, Nash, 1990, p17.) This devolution is part of the state's response to maintain its legitimacy while the commodification of education takes place. Within the New Right framework, society is made of individuals who

form a homogenous society committed to the market ideals of choice and individualism. Groups which form that society - ethnic, gender and class - are now overlooked. Bates explains that, according to the New Right ideology,

*"The role of the state is to ensure that the corruption of service provision through its capture by producer interests (teachers, doctors, social workers etc) is ended. Choice exercised individually through the market will result in more appropriate delivery of services at less cost." (Bates, 1991, p17.)*

### **Boards of trustees**

Boards of trustees had been in existence less than two years at the time this research took place. For this reason there has been little time for formal evaluation and study by academics and others. Boards were established by the School Trustees Act,

*"An Act to provide for the establishment of boards of trustees for State primary, secondary, composite, and correspondence school, and for certain other educational units." (1989, No 3)*

boards had their functions amended some months later by the eighth schedule of the Education Act (1989). Boards of Trustees have had little time to develop patterns of governance to assist them with the challenges that the reforms have demanded of them. Despite the difficulties boards have proved remarkably resilient and resourceful, as three in-depth studies have shown.

The two foundation documents of the reforms: Administering for Excellence and Tomorrow's Schools set the framework in which the Trustees were to work. An influential paper of the time said

*"The purpose of Tomorrow's Schools is to improve the education system.*

- it is about improved learning opportunities for all children;
- it is about having a system responsive to local needs; and
- it is about better use of our education dollars.

*We believe these improvements will result from greater parent involvement with the school, greater decision making authority at the school level and local control of expenditure decisions." (Ballard and Duncan, 1989, p1.)*

Governing Schools (1989) was the handbook printed to guide trustees through the governance role and to assist in the development of school charters.

*"The board is accountable for the charter. It is accountable on the one hand to its electorate - the community - and on the other to the Minister through the Review and Audit Agency. The board will ratify its charter and be responsible for the negotiations with the Ministry of Education as it seeks approval." (Ballard and Duncan, 1989, p2.)*

The Ministry of Education was to approve the charters, but boards had the responsibility to ensure that policies were written to support the charters' goals and objectives. Much of the charter was compulsory and this included the section on equity which required that six separate policies be written, including the timing of review dates.

The University of Waikato in its two reports on Monitoring Today's Schools has provided an important base line for subsequent research. While the first report concentrated on the composition of boards, the elections, the election process and the first meetings, the second report has provided valuable insights to attitudes to equity and equality. It is clear that boards' attitudes were wide ranging (University of Waikato p42): they supported the concept of equal opportunities but were divided about what it meant, (p52) and most primary schools were not aware of any discrimination or inequality in their schools. (p63) There were differing views within boards and between boards

about Maori culture. Maori supported either bilingual or total immersion as well as targeting of resources, while in contrast, non-Maori views were more divided with some believing equal opportunities for Maori already existed and the gaps which are apparent are a result of individual failure. (p61) Despite the wide ranging views that boards held, particularly in matters of equity, the report stressed the commitment they had to children.

The initial difficulties which boards faced were featured from time to time in newspaper reports. The frustrations they faced and in particular 'the paper war' was described at length by Cathy Wylie (Dec 1991, p14-15.) The accountability mechanisms contained within the school charter, particularly relating to equity, were frustrating for some. Concerns were being expressed at the need for more training because the new agencies were unable to give the support that many boards wanted.

The Lough Report (1990) which began investigations into the new administrative reforms recommended that the charter requirements be relaxed, and that resources be redirected to assist the Schools Trustees' Association to help schools to implement equal employment opportunities programmes. (p7-8) The report also focused on the need to ensure that expertise within boards was retained.

The latest report on The Impact of Tomorrow's Schools in Primary Schools and Intermediates (Wylie 1991) has shown that just under 25% of boards received training in Treaty of Waitangi issues and equal employment opportunities. In addition only 10% in the sample requested training in Treaty issues and multiculturalism. (p52) However the widely reported opposition to equity aspects of the charter were not shared because,

*"two thirds of trustees reported themselves pleased with their school's charter." (p59)*

Indeed only 9% of boards saw equity as a major issue facing boards.

Expectations of the charter's impact were greatest in schools with high Maori involvement, but taken overall, 65% of schools felt that the charter would have little impact because the school was already doing what was required by the charter. (p60). Only 15% of boards felt that the charter would produce a more equitable education for the children. (p128)

### Policy writing

The major policy documents of the reforms, Administering for Excellence and Tomorrow's Schools, are substantive policies in which considerable emphasis was placed on the development of charters and policies. The necessary legislation for charters is contained in the 1989 Education Act No 80.

61 Charters - 1 Every Board shall ensure that for each school it administers there is a written charter of aims purposes and objectives prepared and approved under this section and section 62 and 63 of the act.

64 Every charter has the effect as an undertaking by the Board to the Minister to take all reasonable steps to ensure:

- a The school is managed, organised, conducted, and administered for the purposes set out or deemed to be contained in the charter; and
- b The school, and its students and community, achieve the aims and objectives set out or deemed to be contained in the charter.



The shift from consensus decision making towards a scientific managerialism in educational policy research, analysis and policy making and writing has been noted by writers. (Bates, 1990, 1991. Codd, 1990b. Prunty, 1984, 1985.) Prunty tells us that policy is about values, and objectivist orientation cannot be used towards values therefore policies developed in a technocratic way will be inconsistent. (1984, p24.) Policies are generally about change, and change will be resisted if the policies are developed in a managerial technological way. (1984, p3. Codd, 1990b, p18.) Each person sees the world differently, but for policy proposals to be seen as legitimate they must fit the perceptions of the real world. (Macpherson, 1991, p22.) Policy making therefore must be culturally sensitive to heighten legitimacy. (Cheng Kai Ming, 1991, p3.)

For policy research and analysis to be effective it must be grounded in the real world of schools. (Yeakey, 1983, p291. Macpherson, 1991, p22.) Concern is noted that policy problems are regarded as technical problems which can be resolved by the application of some form of rationality like 'management by objectives'. (Prunty, 1985, p134.) The charter is described as a contract between the state and the institution and between the institution and the community. (Picot, 1988, p46. Tomorrow's Schools, 1988, p4. Bates, 1991, p9.) Bates goes on to argue that education is both cultural and technical, and the charter as a contract removes the cultural aspect. (p9) As described in the Act the charter provides a mechanism for control by the state which is certainly greater than before. (Bates, 1990, p46.)

Boards of trustees are responsible for writing and approving the policies contained within the charter. These are procedural policies which describe who or what is going to do it and how it is to be done. (Prunty, 1984, p3.) In the handbook for trustees, Governing Schools, boards are advised they may delegate the task of developing policies to groups of staff, other trustees and members of the

community. The development and review of the policy is the basis of the board's governance role according to Kilmister, who has held many seminars for boards throughout the country on their governance role. In this model, policies provide direction, conditions, boundaries and procedures for organisational players at all times. (Kilmister 1988 p18/39.)

However, the most influential method of writing policies in New Zealand at the time the reforms were adopted was that of Caldwell and Spinks. Through seminars and a book entitled, Self Managing Schools this model consisted of a statement of purpose and one or more guidelines to provide a framework. (1988, p41.) Corson takes issue with this model because it was not an

*"appropriate policy-making model for individual schools."*

and that the approach is dangerous because it is

*"filled with prejudices, biases, mistaken predictions, and plain error." (1990.)*

In another article he gives an alternative approach to policy-making based on Popper's theory about the growth of knowledge. (1990b, p1.) In this model policies are tested against theory, experience, and the real life of the school. The policies in this model are also under a continuous evolutionary cycle of review and improvement. (p14) Bates counsels caution when adopting ritualistic methods of writing policies because the effects may be that independent, critical and imaginative thinking could be stifled. (Bates, 1981.)

The charter requires that the trustees write policies which are to be completed by the end of 1991. There are six separate equity policies, each with a review date. The goals and objectives of these policies are mandatory. (1988, Chapter 3.) If schools are to develop effective



equity policies, issues must be debated to resolve them. Unless there is openness and individual consent, opinions expressed in the final policy will only appear to have a consensus on the surface. (Boyd, 1989, pxiii.) Similarly the CRISSP project found that people must own the change if it is to happen, and that parents do want to be involved. (Ramsay, 1990, p10/19.)

The first research into policy writing by boards and their attitudes towards equity, as well as a whole host of issues, has just been completed. In this study 65% of trustees felt that the charter would have no effect on their schools because they were already doing what was required of them as set out in the charter; only 17% thought it would provide a more equitable education. (Wylie, 1990, p60.) About 7% of trustees reported difficulty with writing policies, while 9% felt equity issues to be a major issue confronting boards. (p7.) Rural schools reported greater parental involvement in equity policy writing than their urban counterparts. However, it was interesting to note that only two fifths of the parents reported having seen the charter. (p92.)

### **Cultural reproduction**

The extent to which schools can influence the lives of their pupils has always been a contentious issue. There is the theoretical tradition that schools only reproduce the culture of the dominant group in society and therefore perpetuate the cultural and economic divisions within society. (Bourdieu 1976. Apple 1979 p33) For example policies can only be written by those with the expertise and knowledge. This, in turn, maintains the hegemony of the dominant group. Schools process knowledge as well as people and this has political consequences for ideas such as equality of opportunity. (Nash, Harker and Charters, 1990.)

Bourdieu's studies supports the notion that the schools continue to maintain the existing patterns within society. (1976, p110) His studies have profoundly influenced later researchers and writers because they describe and account for the ways society excludes underprivileged children. Bourdieu describes the "triadic structure" of prestige language, schooling and taste which dispossess the working class. (Bourdieu cited in Harker 1982 p38-40) Success at school brings an acculturation to the dominant group within society, and it is for this reason that there is Maori disaffection with our present education system. (Harker, 1990, p40)

The family has a central role in the process of cultural reproduction. (Connell,1982,p74. Nash, 1990. Hughes and Lauder,1990.) Parental educational achievement and ambitions create the environment which motivate children to seek similar success. (Nash, 1990. Middleton, 1990, p113) Working class parents tend to lose contact with the school as their children move to secondary school because the school organisation is inhibiting and parents are unfamiliar with the work. (Connell 1982, p52)

Recent Australian research supports the notion that subject choice at university is more likely to be a result of socio-economic factors than the type of school attended. The data showed that class difference was probably the main reason for subject choice. (Baldwin, 1990, p62) Similar research had already been undertaken in New Zealand and illustrates that socio-economic factors maintain privilege and inequality. (Lauder and Hughes, 1990.)

The school and the family are part of the larger framework of society which includes the state. (Nash, 1990. O'Neill, 1990) Schools or families on their own cannot equalize achievement because of this framework. (Apple, 1982.) There is a need to understand the background of schools and families in order that the cultural reproductive cycle may

be recognised, and informed decisions made. While teachers show widespread egalitarian sentiment and have considerable knowledge about inequalities within society, lack of cohesion in these responses makes change more unlikely. (Connell, 1985, p198-200) Cultural reproduction is evidenced in three specific areas in New Zealand by gender, ethnicity and class.

### **Equity: class**

New Zealand is not an open, socially mobile society despite the rhetoric to the contrary. Privilege and disadvantage are reproduced down through the generations and this is all that is needed to create class differences and cultures which, in turn, affects educational choice and career chances. (Lauder and Hughes, 1990, p55.) Wylie considers that three fifths of the New Zealand population can be regarded as disadvantaged. They fall into six groups: women and girls, Maori, Pacific Islanders, disabled, ethnic minorities and rural dwellers. (1987, p1.)

Despite the attempts to promote equality of opportunity as the lynchpin of the New Zealand education system, by 1973 it was admitted by the Department of Education's Secondary School Curriculum Report (1973) that the reason that students failed was not because of ability:

*"but [because] of an accident of birth and circumstances which relate to their social culture background....."(Wylie, 1987, p3.)*

Inequality is of concern because it undermines a stable society by perpetuating control and advantage. (Nash, 1986. 1990. Harker, 1990.) Dominant groups within society have dominant values, and the cultural and ideological leadership they provide maintain, through the state of hegemony, economic supremacy for those groups. The concern is that if conditions of fairness do not exist then there

is a real likelihood of an underclass such as Maori occurring. (Lauder and Hughes, 1990, p43 - 47.) Their research used a sample of 2,500 Christchurch school leavers in 1982, and studying social mobility and class closure using the measures of socio-economic background and ability. (p48/49) An earlier study in Britain, (Willis) showed that the resistance that working class boys used against the scholastic culture of the school not only cuts them off from jobs but assists them to associate manual work with masculinity. (Willis, 1977.)

Frequently disadvantage can cause continuing delay in development, and this deprivation can also become ingrained within the family. Even when situations improve, family behaviour continues as though that the disadvantage remains. (Essen and Wedge, 1982, p167 -175.) Their study argues that avoidance of deprivation is essential rather than improving conditions. (175)

The educational system not only fails to prevent inequality arising from family differences but also lowers the attainments of many pupils, particularly working class Maori. (Nash, 1990, p128) Class and gender are power structures and the school sorts and divides on these bases. (Connell, 1982, p180.) In particular, a norm referenced assessment system continues to frustrate the egalitarian aim of education in this country. (Wylie, 1987 p4)

As unemployment has worsened and participation in manual labour has decreased, opportunities for improvement in the life chances of some socio-economic groups have diminished significantly. Present governmental policies favouring choice, competition and individualism in the existing economic climate, at the expense of equity, will not improve the situation for these groups. (Lauder and Hughes, 1990, p55.)

If fairness of outcome was an important goal of education in New Zealand then significant improvement could take place. (Wylie, 1987, p6.) The identification of disadvantaged children and the targeting of resources may be one way of interrupting the processes that cultural reproduction maintain within society. (Essen and Wedge, 1982; Nash, 1990.) As Nash has pointed out, this may not gain acceptance from the privileged middle class, but schools can still provide an education in useful knowledge and as well analyse the structures which affect the lives of teachers and pupils. (1990, 129)

### **Equity: gender**

*"Schools cannot teach what society does not know" (Spender, 1982,p1)*

Feminist writers take the view that the notion of what constitutes a good sound education was formulated long before women were educated en masse, therefore modern curriculum and pedagogy will not create gender equity. (Spender, 1980, Spender, 1987, Shakeshaft, 1986.) The patriarchal paradigm of education will remain until women's views co-exist with men's views. The contention is continued by Spender and Sarah (1980) that even if every recommendation on sexism in our schools were carried out the position of women in society would not change, because education alone is not responsible for the divisions within society.

Excellence is being demanded of our schools but

*"Without gender equitable (sic) schools, excellence will remain ever beyond our reach."  
(Shakeshaft, 1986, p500)*

Two factors emerge from the literature: what is good for males is not necessarily good for females, and if a choice is to be made then the policy which is chosen will be based

on what is good for males. (Shakeshaft, 1986. Arnot and Weiner, 1987. Connell, 1982, 1985. Middleton, 1990 et al) Yet, as Shakeshaft has pointed out schools which are hostile to females are not places which will assist them to strive and achieve their best efforts.

Governments have responded to gender equity by developing policies which seek to promote a more equal distribution of power and control. However, there are major tensions in policies which are economic and founded on New Right monetarist ideology and those which are committed to equal opportunities. Further tension can also be seen in those policies promoted by central governments and the desire at local levels for self management and reform. (Arnot and Weiner, 1987, p327)

The contradictions within governmental policies can be seen in New Zealand as the state has to maintain social and economic order for empowered groups. James and Saville-Smith contend that

*"New Zealand is a 'gendered culture', a culture in which the structures of masculinity and femininity are central to the formation of society as a whole." (1989,p6)*

Although race and class divisions exist they are not highlighted in the same way as the social divisions which separate the genders. The ideal role of government is to provide information to enable individuals to have maximum freedom of choice, according to a Treasury analysis, yet political imperatives require that government reduce social inequality and make a greater commitment to the Treaty of Waitangi. (Middleton, 1990, p85.)

Schooling practices cannot bring about social and economic change and while schools can determine procedures within their environment they will nevertheless, continue to reflect current societal structuring processes. (O'Neill,



1990, p91) Connell's study showed that schools must still be prepared to struggle against sexism and patriarchy.

(Connell, 1982) The school is one of the power structures which parents and students have to deal with in society because it organises lives, and divides and sorts while controlling the knowledge. Connell's later research in 1985 illustrated class and gender relations which have had a major impact on the work of teachers.

*"The connection between masculinity and authority is one of the major axes of our culture, and even where it is under challenge it is very resistant to change." (p45)*

The hierarchies of power also tend to enforce conservatism while the competitive academic curriculum is regarded as most important inside and outside the school.

Both within New Zealand society and overseas, research has identified the practices and procedures which continue discrimination within our schools. In one local example classroom interactions between teachers and pupils in a group of junior classes in Auckland showed that there were 70% more interactions with boys. (Newton, 1988) In an unpublished report Meha described the processes by which Maori girls and teachers are increasingly sidelined from mainstream education. (1988.) In 1989 a resource book, Countering Sexism in Education was published by the Department of Education to encourage awareness and supportive practices for women and girls in our schools. This was distributed to all state and integrated schools and institutions.

Research in rural schools indicates that basic inequalities remain within the family and divisions of labour even when schools consciously promote gender equality. (Kyle, 1990. p54.) Identification of research which needs to be brought to the attention of administrators of both small and rural schools to promote gender equity has also been undertaken. (Bailey and Smith, 1987)

Finally, within boards themselves while there has been a gender imbalance with chairpersons, (more men) and secretaries, (more women) respectively, conscious efforts have been made by several boards to correct perceived imbalances. (University of Waikato, 1990, p8.)

#### **Equity: race**

The continuing failure of education in New Zealand to empower Maori, in particular, and other Pacific Island groups in general has been well documented. Even if the only material available were the yearly education statistics, results are damning to a system which has emphasised the availability of free education and the so-called equal opportunities which lie within it. It is the barriers which have prevented and are preventing change that this section addresses because it is another factor which impinges on equity in our schools.

As King has pointed out, the error that the Pakeha makes is to measure Maori by European standards, and then to say that they do not measure up or compete in our society. While the Maori has had real difficulty with the European culture so has the Pakeha had real difficulty with the Maori culture for no matter how much we may understand it we can never be part of it.

(1985, p198) Maori children are not taught successfully and as a result are severely disadvantaged. Teachers often assume Maori children have low academic ability, school certificate filters out at upper levels of compulsory schooling, subject choice of low status frequently compounds failure. (Benton, 1987 Part 1) The organisation and content of the curriculum as well as subject status therefore affects learning because when taught as a common culture minority groups are marginalised. (Benton, 1987, part 2.) Maori children have been required to renounce their heritage language in



order to gain an education which has not been culturally appropriate for them. (Benton, 1990 p32)

There is a "crisis of legitimacy" within the recent educational reforms because they do not address the real issues facing Maori. Devolution of educational administration downwards has only succeeded in exporting that crisis into the community. The withdrawal of the state needs to be challenged because of the Treaty partnership and on equity grounds. (Smith, 1991, p3.) Equity provisions within the charter have been criticised because they have "unfairly" advantaged Maori but these policies which are expected to ameliorate inequalities in a "free market" education

"tend to serve a sticking plaster function."  
(Smith, 1991, p22.)

The recent developments of both kohanga reo and kura kaupapa schools are examples of the resistance to existing pedagogues and a way forward for Maori education. This revitalization of Maori language and culture seeks to provide total immersion education resulting in bilingual and bicultural competencies in both Maori and English. (Smith, 1990, p79)

## **Conclusion**

Educational reforms in New Zealand have featured a changed relationship between the state and institutions. Part of this changed relationship was through a contract between the new boards of trustees and the state called the charter. Formal policy writing is a new task for boards of trustees as a requirement of the school charter. There has been, as yet, little formal research undertaken on the approaches and methods which boards are currently using to write these policies. While there is

considerable research on the attitudes and values which New Zealanders have towards equity issues, again there is little research to show how these attitudes and values have impacted on the policy writing process.

### 3 Research process

*"Arising from the speed of change associated with the introduction of Tomorrow's Schools, many schools have had to develop administrative management practices under considerable pressure. Some have in place most elements needed for effective administration and management, others are struggling.*

*"Only when all the elements needed for effective administration and management are present will the benefits of the reforms be realised in higher quality educational outcomes." (Lough, 1990, p16.)*

#### Introduction

There were four aspects to the selection of methods chosen in this research. At all times there had to be respect for the individual and this was shown in the way the researcher involved the participants. The language used had to be a shared one and therefore questions asked needed to reflect this universality.

*"all forms of knowledge are grounded in social practices, language and meanings, and, hence there is no way of 'observing' the world independently on these." (Hughes, 1980, p123.)*

Interviews were be done in an interactive way which allowed for shared meanings and interpretations to develop, and this approach it is hoped, has contributed to all our understandings.

#### Selecting schools

Ten contributing primary schools were selected for this research: five were from a large city environment and the remainder were from five separate rural farming districts. All ten schools had written their equity policies. The

selection of these particular schools was made because not only had they completed the policy writing task but they were also known to the researcher in a professional capacity. Twenty schools in all were approached before finding five rural and five urban schools who had written their equity policies.

Four of the five urban schools were from inner city lower socio-economic background while the fifth was situated in a stable middle class suburb of the city. Their roll sizes varied from 130 to 290 pupils. In contrast, the rural schools selected were quite small: one sole charge school of ten pupils and four two teacher schools with rolls of twenty seven to thirty six pupils. Both the principal and the chairperson of each school were informally approached first to check their willingness to take part in the research. This was then followed up with a formal letter to both of them. (Appendix 1)

Small rural schools have been selected for this study because they are an important feature of New Zealand education. In Staffing of State Primary Schools 1990 figures from the Research and Statistics Division of the Ministry of Education show that there are 2257 full primary, contributing primary and intermediate schools in New Zealand. Schools with fewer than 151 pupils made up 54 per cent of the total.

### **Techniques used**

Interviewing with a questionnaire was the method chosen for obtaining data. The questions asked were open ended and designed to give a frame of reference for the answer. (Appendix 2) A tape recorder was used to record all the interviews, which enabled the researcher to concentrate on the interview and not on writing data.

This method was preferred because it personalised the situation and more importantly put a human face on the research. It allowed for in-depth responses as well as enabling the researcher to draw out responses that were too brief. This approach can also allay the fear that material from a questionnaire filled out in isolation will be used in a way the participant doesn't want. In addition, this was easy to replicate or follow up at a later date. This proved to be the case in one situation when the unsatisfactory background noise necessitated the interview being repeated. The weaknesses in using this approach are the constant difficulty which all researchers have in formulating relevant, unambiguous questions while still dealing with important issues. Certainly two questions asked in this research fell into the latter category and had the weaknesses noted above.

### **The interviews**

Four people from each school were interviewed: the principal, staff representative, chairperson, and a fourth member of the board selected by the chairperson. The interviews all took between a half and one full hour to complete. As they had to be fitted around the working day and as considerable travelling was involved in rural districts it was important that interviews could be completed in lunch hours or after work. The venues for the interviews therefore were many and varied because trustees live and work in other places besides schools.

In some cases, individuals were nervous and some time was taken to reassure them and put them at ease. At the basis of this research was a respect for the individual not only because each was assisting with the research but also because both parties in the interview were learning as the interview progressed. All participants were promised a return visit when the data had been collected and collated.

Transcripts of each answer from each person were first recorded on a single card. When all answers had been transcribed in this way responses to each individual question were then entered into the computer and sorted in two different ways. The first method was to select answers by categories of person: principals, staff representatives, chairpersons and individual board member in response to each question. The second method was to select answers by school from the four trustees who were interviewed.

Two months after the interview, the completed data chapter was taken back to the participants as promised. Copies of the data were distributed and each question was canvassed again and checked for accuracy. Discussions which developed from these sessions have resulted in requests for literature about a range of issues including equity. These sessions were valuable because the researcher does not have the right to take knowledge without sharing it. (Lather, 1986.) Participants were pleased to see their views shared by others. They questioned the interviewer about her findings and were keen to suggest alternative approaches in the future for achieving equity in their schools.

### **Triangulation**

Triangulation was undertaken in two ways for this research. First of all by asking participants to check the recorded data in the data chapter, patterns in responses which had emerged could be checked. Secondly, by collecting all the responses for each school together consistency of response could be verified. In one case an inconsistent response has been noted in the data chapter.

## **Conclusion**

Within this chapter the philosophical and practical approaches to the research have been described. This chapter has also noted the practical limitations which these approaches can have. It is for the reader to decide in succeeding chapters whether these limitations have detracted from the philosophical and practical considerations which were used in undertaking this research.



#### 4 What they say: the trustees respond

*"I see as the essential aim of the education system the promotion of the highest possible standards of educational achievement by every New Zealander. That aim encompasses both a commitment to excellence, and a commitment to equity." (Goff, 1990, p13.)*

#### Background of boards

##### Gender

It was interesting to note the high numbers of women interviewed in this survey. In the ten schools, twenty seven were female and thirteen were male. Of the principals five were men and five were women, but there was only one male staff representative in the sample. That imbalance continued with chairpersons of whom seven were women. In rural schools, of the twenty people interviewed, fifteen were women while in the urban areas that number dropped to twelve. In two rural schools all eight interviewed were women.

##### Ethnic Identity

All those interviewed were New Zealanders of European origin.

##### Urban or Rural School Attendance

Of the forty in the sample, twenty five had been educated totally in an urban environment while there were six educated in a rural environment. The remaining nine were educated in small rural primary schools but continued their secondary education in an urban setting. Seven of the chairpersons were educated in the cities. However, taken

overall, no clear patterns emerged of those educated in rural schools remaining in the rural school environment on the boards of trustees, or of those educated in urban schools remaining in the urban school environment on boards of trustees.

#### Years of Secondary Education

A significant number of the trustees had attended secondary schools for five years, thirty three out of the forty questioned. The remaining seven, (six were women,) had attended secondary school from two to four years. Of that remaining seven, there were only three who had not gone on to tertiary study.

#### Further Training Beyond Secondary School

As might be expected the ten principals had completed a course at Teachers Colleges. Of those ten, eight had continued their education with either university or ASTU courses. Three had completed degrees.

Not all the staff representatives were teachers. In rural districts, three staff representatives were non-teachers. The remaining seven questioned in this sample had completed a teachers college course, two had not had any further training, while one had completed a degree. Three of those seven teachers had continued with university and ASTU courses.

Nine of the chairpersons had continued with a tertiary education in a wide range of courses. Three had trained to be teachers and the remaining six had trained in computers, nursing, school dental nursing, radio technology and training within a large company.

Similarly, nine of the board members had continued with tertiary training. Again three had completed courses at

teachers colleges with one gaining a degree as well. Of the remaining six, two had completed degrees, two more had gained university diplomas, one had undertaken post graduate nursing courses and one technician training.

### Present Occupations

Of the forty interviewed, nineteen were principals or actively involved in teaching. A further three were teachers aides. The remaining eighteen fell evenly into a range of occupations which included health, farming, technology and business, both large and small. Four identified themselves as homemakers. There were two whose occupations would have placed them in categories 5 and 6 on the Elley Irving index.

### **Equity policy writing and training**

**QUESTION:** What training has been provided for the board and staff on equity issues? What have you done?

There was a considerable variation in the range of training that boards and schools took part in. Some boards had no training at all while others took part in a range of training. Principals and staff representatives were more likely to have attended inservice courses while chairpersons and board members were less likely to have attended seminars and meetings about equity. However, on a personal level, the difference between the professional and lay members of boards becomes more apparent. Of the ten principals interviewed only three (all rural principals) had not sought further training, while five staff representatives had taken part and five had not. The picture alters with chairpersons and board members. Three of the ten chairpersons had undertaken further training as had two board members. In no one school did the board had all those interviewed attended a formal training seminar.

**QUESTION:** Where did you get your information on equity from?

There were many sources of information that boards had access to about equity and equity policies. Apart from formal training courses supplied by education providers and a series of seminars organised by the district office of the Ministry of Education, a considerable amount of reading material was sent to all schools. The main sources mentioned in interviews included School Trustees Association, Human Rights Commission, Hillary Commission, NZEI literature, rural schools adviser, and the Ministry of Education's EEO video. Many respondents also made mention of the informal contacts and discussions about equity with colleagues knowledgeable about equity matters.

**QUESTION:** How were the equity policies written? What methods did you use? Did one person lead, or did you work as a group?

The methods by which the policies were written in each school differed. In the five rural schools the draft policies supplied by the rural schools adviser formed at least the basis, if not all, of the school's new equity policies. These schools sent the draft policies out to parents for comment after minor changes had been made for local conditions. Two of these schools held parent teacher evenings to explain the equity policies intent and effected minor changes as a consequence.

The situation in urban schools was quite different. One school used a Ministry of Education Liaison Officer to lead a public meeting with parents, board members and staff to prepare a basic draft of the policies. These were subsequently refined by the staff of the school. A second school released a small subcommittee of staff from teaching duties to write the policies. These were later amended by

staff before going to the board for approval. The other three schools' policies were developed by the principals in conjunction with staff over a series of meetings.

**QUESTION: Who actually wrote the policies?**

In the majority of schools principals, sometimes assisted by staff, wrote the equity policies. In all rural schools policies which had been written and collated by the rural schools adviser were used. In every case minor amendments were made to these to suit local conditions. The attitude towards writing the policies is perhaps best summed up by one urban principal who said:

*"I wrote the policies, the thoughts weren't necessarily mine but I had the language skills."*

**QUESTION: Which one of the equity policies was the most difficult to write? Why?**

Considerable differences emerged when schools were asked which aspect of equity proved to be the most difficult to write. Boards also differed within themselves about which policy had proved the most difficult. Board members who hadn't taken part in the writing exercise found it difficult to comment not having been party to the discussion which led up to the approval of the policies. Other responses then fell into four distinct categories: no problems at all, (mainly principals); the acknowledgement of sexual harassment; the provision of equitable outcomes for students; and finally the assurance that the curriculum is both non-sexist and non-racist. The difficulty which some of these issues raised for some boards was described by one chairperson as:

*"I felt everyone skirted around the issues, like walking on eggshells, frightened of opening their mouths and saying the wrong thing."*

**QUESTION:** What were the next steps after the policies had been written?

After the policies were written and approved by the boards of trustees the majority of schools filed them in either a special policy file or in a policy book. Some boards included a bring up date for later revision and comment, others appeared to consider the task complete. One school did publish the policies and placed them in all classrooms alongside the school charter. This school also provided for parents a "Readers Digest" form of the policies.

**QUESTION:** Have there been any changes in the school since the policies have been written? Describe these.

The relationship of the policies to actual practice was not close in many cases. When boards were asked to describe any changes which had occurred in the school since the policies had been written thirty four of the forty board members interviewed saw little or no change. However of that thirty four, six commented that it was too soon to observe any change while four others felt that the school was already sympathetic to equity and the policies were merely formalising current practice. Two urban principals noted that it had heightened the awareness of boards and staff while one went on to comment further:

*"The trouble with writing policies is that you write them, and put them here, (policy book), and unless you say, let's keep looking at them and keep turning them over, they fade again and it's more difficult to find a place in your programme to keep them current."*

**QUESTION: What are your views about the board writing equity policies?**

There was much greater unanimity in all boards when asked to give views about boards writing equity policies. Nearly three quarters of those interviewed felt this was an impossible task for the boards to do and some expressed their feelings quite forcibly. One urban chairperson explained that:

*"It is the board's responsibility to write them but by and large, boards generally are not au fait with the circumstances, the requirements, the modus operandi of the school to be able to do it. It is more appropriate to do as we did, to task a subcommittee of the staff, under the principal's direction and then review what they did and compare it our existing goals and objectives."*

Rural chairpersons, who had draft policies supplied by the rural schools adviser were harsher in their comments:

*"If we had started from scratch, I don't think our board of trustees could have handled the policies. The wording is intimidating. eg non-sexist, non-racist. We don't deal with this sort of language every day. We've been to a policy writing course but it didn't prepare us for this."*

Other rural board members did not always appreciate the origins of the draft policies which had been provided by the rural schools adviser and saw it as a:

*"Waste of time, these policies were already written for us anyway. I can see their place and they should be written down in black and white. I found it hard in some places to understand what they meant, they weren't written in plain English."*

**QUESTION: What does the term equity mean to you?**

Definitions of equity that board members gave revealed the extent to which comprehension of the term was not in accord with present charter goals and objectives. Twenty-one of



the forty questioned interpreted equity as equality of opportunity. This response was equally divided between urban and rural schools. In two urban schools all board members answered this way while in rural schools that response was more evenly spread through the sample.

A further seven responses also defined equity as equal opportunities but moderated the answer with comments such as:

*"...assist those with greater needs also."*

However, taken as groups, chairpersons recorded six equal opportunity definitions with a further two adding a moderation as described above, while the board representative responses were similar. Staff representatives and principals on the other hand had five equal opportunity definitions each with two further principals adding a moderator.

The remaining twelve responses reflected some content of the charter equity goals and objectives and provided more robust definitions:

*"In the past it meant equal opportunity and it was said that this was to give everyone an equal start. It has moved on now, equity is more than this, it is trying to ensure equal outcomes.....Everyone should be helped to achieve as much as they can as an individual. In school you target resources to those who have the need."*

**QUESTION:** How does the board plan to review and update its equity policies?

Five boards have not set review dates for their equity policies or decided about update mechanisms. As two of these schools have just completed writing their policies

they explained that it was too soon to set these. As one chairperson explained:

*"We don't have any plans yet, just pleased to have them finished!"*

The other five boards plan to review the equity policies annually. Several boards commented on the need to develop a regular bring up system for reviewing all policies.

### **Charter equity goals**

#### Goal A

To enhance learning by ensuring that the curriculum is non-sexist and non-racist and that any disadvantage experienced at the school by students, parents, or staff members because of religious, ethnic, cultural, social or family background is acknowledged and addressed.

QUESTION: Do you know anyone who has been disadvantaged because of gender, ethnic, cultural, or social or family background?

When questioned about knowledge of social disadvantage within their schools the majority were not aware of any specific examples. One principal noted that:

*"I don't know of anyone but that is not to say that it doesn't happen."*

Another trustee, (a teacher) noted that:

*"Any child for whom English is a second language is disadvantaged."*

This ESOL theme was continued in another response when a trustee noted:

*"The best is being done with the difficulties the school faces. The challenge is when the father is Russian and the mother Ugandan to find creative solutions. Attempts are made to recognise and affirm different cultures."*

#### GOAL B

To enhance learning by ensuring that the school's policies and practices seek to achieve equitable outcomes for students of both sexes; for rural and urban students; for all students irrespective of their religious, ethnic, cultural, social, family and class backgrounds and irrespective of their ability or disability.

**QUESTION:** Are you aware of groups in the school who do not experience successful outcomes?

When asked if they were aware of groups in their schools who did not experience successful outcomes, most stated that they were unaware, although several qualified their answers with comments which indicated that as a general rule they knew these difficulties must exist.

*"Not obviously, there will always be students who come from socially disadvantaged backgrounds and who cannot make the most of their opportunities at school."*

Some responses also showed an awareness of the disadvantages that Maori children experience at school while others saw that disadvantage was more apparent in secondary schools. In the main the answers also indicated a determination to ensure that all students did experience success.

**QUESTION:** What is being done to help these groups?

In the three urban schools which had identified children

who did not achieve principals and staff representatives described specific programmes which were being used to assist them. They included: support for Maori Language, programmes for gifted children, reading recovery, language enrichment programmes, extra reading resources at standards three and four, ESOL and home visits, and after school programmes. The other two urban schools felt there wasn't a need for any extra programmes. In rural schools one principal described individual programmes which had been used at the school when the need had arisen in the past. Four rural schools felt enough was being done within the conventional school programme. Chairpersons and the other board members in the main were not familiar with the measures schools were taking to improve learning outcomes. However one chairperson described in detail the programmes the school was implementing, and identified the funding sources within the operations budget.

**QUESTION:** Are there groups of students who do not participate in a full range of activities?

The majority of boards felt that in their schools all children participated because of the efforts staff were making and the financial assistance provided by the school to ensure no one was left out. There were four specific examples given of children not participating in school activities. Two were withdrawals on religious grounds, the second example given was non-participation in sport, and the last illustrated an attitude that one rural community held regarding gender roles in school activities.

*"Girls don't do this and girls don't do that."*

#### GOAL C

To enhance learning by providing role models, such as girls, women and people from different ethnic groups in

positions of leadership and authority and boys and men as caregivers so that children can understand the meaning of equity in behaviour they observe from day to day.

**QUESTION:** Does the school provide good role models for students?

All the schools questioned were sensitive to the importance of providing children with suitable role models. Seven of the schools were firmly of the opinion that their school provided good modelling. One urban school however did not. A new principal, (male), with a very stable and traditional staff was concerned about the modelling that his school provided. The chairperson shared his concerns.

*"It doesn't. The staff don't. The board of trustees is trying to address this and the principal recognises this and is consciously trying to promote these ideas with the staff."*

This was a view not shared by the staff representative and the other trustee.

There were two rural schools which were concerned to ensure that their school did provide suitable modelling because both teachers were women. All the eight people interviewed were very conscious of the image their school might present and were always looking for ways to present a balanced gender picture.

Some very definite views were expressed in the responses about the strengths that schools had.

*"I think this school provides excellent role models and it is one of the strengths of this school. Some of the kids don't come from the best of homes and have standards we don't find acceptable. It's our duty to provide good role models so these kids can fit into society." (principal)*

The chairperson in the same school stated that

*"Not explicit but there is good modelling. Capable, professional staff make good role models. One male teacher, a Maori, is very popular and is sought by Maori and Samoan children."*

#### GOAL D

To enhance learning by developing policies and procedures which aim to eliminate any sexual harassment of students, parents, or staff members in the school and to provide appropriate and proper grievance procedures to handle complaints of sexual harassment.

**QUESTION:** What steps are taken to ensure that the policies are implemented?

Two of the ten schools had not developed policies and procedures for eliminating sexual harassment. The range of responses for this question indicated a few difficulties that schools were having in writing and implementing this policy. The four rural schools which had completed the policy writing process felt sexual harassment to be a non-issue. These comments were shared by principals and trustee members alike. Most of their responses centred around the fact that the school was small, there hadn't been problems in the past, therefore there were unlikely to be problems in the future.

Urban schools on the other hand displayed a greater range of inconsistency with their responses, both within a school and across the four schools which had completed them. For example in one school the principal explained that although the policies and procedures had been developed children and parents were not yet aware of them. However, a trustee at the same school was sure all the children knew about the policies and procedures. There was also a feeling in two

other schools that although the policies had been written they had not been adopted by teachers as part of school programmes.

*"Policies state clearly what staff have to do. Perhaps we need to reread the policies."*

This comment was in direct contrast with other comments which indicated an awareness of the new policies.

*"With such an open staff it isn't a problem. I don't feel intimidated like I did at my last school. Here junior school teachers are valued."*

*"We are making sure that all students know who to go to on the staff if there are any problems."*

*"We force on ourselves an internal review. This is part of the appraisal system, as part of visiting classes."*

### **Community Involvement**

**QUESTION:** What input has the community had in writing equity policies?

Communities had little input prior to writing the equity policies. Only one urban school consulted extensively. This school saw the community as parents and used experts within that community for assistance. The parents then brainstormed ideas at a meeting. A random selection of parents was then used to comment on the drafts. (The selection was done by computer. This school uses this technique to ensure the same people are not required to do all the work. They find that they get an almost 100% response from their parents using this approach.)

Of the remaining four urban schools, one school held an evening for parents, board and staff to begin the policy writing process. A liaison officer from the Ministry of



Education was asked to attend and help facilitate the process. Although staff and board were well represented at that meeting very few parents attended. The remaining three urban schools did little to involve their communities. Comments such as:

*"Told them in a newsletter to come and see them, (policies), no-one has. We haven't published them yet."*

*"Was going to invite the parents in but it didn't happen. Difficult to find people within the community who have the time and the knowledge. Those with the knowledge are too heavily committed."*

*"Input came from board of trustee parents. No survey of parents was done but the policies are displayed in the foyer and parents can write on the comment sheet. Parents are advised of this by newsletter."*

*"The school has a huge difficulty in consulting. Over half the parents are solo parents. It is mainly the women who are the caregivers. The children go to their fathers at the weekends. It is very hard to arrange events which can canvas opinion. Language is also a big problem. Those parents (ESOL) haven't much confidence in working in our society yet and they are quite timid. We haven't found a satisfactory way to communicate."*

The five rural schools asked parents to comment on the draft policies which had originally come from the rural schools adviser. Two of the schools held meeting of parents, which were well attended, to explain the purposes of the policies. At both these meetings some minor adjustments were made. The other three rural schools sent the draft policies home, or displayed them in the school foyer. Parents were invited to make comments, but none did.

**QUESTION: How is progress on equity reported to the community?**

In all ten schools reporting fully on equity has yet to take place. Most schools saw that the annual report would be the best place for describing this to their communities. Despite this, three of the schools had already mentioned developments in equity through newsletters. One chairperson writes a "Bot Jot" after every board meeting and the parents are kept informed about latest developments including equity matters.

**QUESTION:** What community groups do you belong to?

As might be expected in the city, principals and staff representatives do not live in their local communities. There was one exception to this. On the other hand, chairpersons and other board representatives were involved in a wide range of activities which included church activities, sporting groups, toy library, scouts and residents associations. There were three exceptions to this.

Rural principals and staff representatives, by nature of their proximity to community activities, took part in any activities that the district had. It was interesting to see that many of the past groups in these communities such as CWI are no longer functional and that rural activities tended to be more in the nature of single events which most people joined in.

**QUESTION:** Are there any groups in the community that are not represented on the board of trustees?

Urban schools expressed real concern about the lack of representation from Maori, Samoan and solo parents on the boards. Samoan and Maori parents had been coopted on to boards originally but some of them had moved into other

communities and were proving difficult to replace. Some interesting comments were made by board members.

*"Lots of parents aren't represented. A Samoan mother found it culturally too difficult and resigned. A Maori father shifted away. Now tends to be professional parents and self-employed. All our board members have a tertiary qualification."*

*"We have men and women, Maori, Samoan and professional and unskilled., but we don't have any solo parents. That is a large chunk of our population."*

*"The most disadvantaged in the community who struggle to cope are not really represented."*

On the other hand rural schools were adamant that all groups within their communities were represented on their boards. In one school comments were made which illustrated a desire for wider representation than is currently possible under the legislation:

*"Board of trustees need to be widened, at present it is very limiting. Local people do a lot for the school and they should be allowed to stand."*

#### **Board of trustees elections**

**QUESTION:** Why did you stand for election?

Principals were not asked this question because the position is already legislated for. Staff representatives reasons for standing varied considerably between town and country. In urban schools staff stood because staff at the school had asked them, or they had prior administrative experience which they enjoyed. Rural staff representatives were more likely to have stood because they were the only eligible person or in the case of one person:

*"I was also horrified at the attitude that some had that they were going to get rid of somebody."*

Chairpersons and board members stood for a wide variety of reasons. The two most commonly expressed were ensuring that good programmes were in place for their children and ensuring that the continuity of experience which had been gained on the old school committees was not lost. These respondents had enjoyed the previous involvement and contact with the school. There were other reasons:

*"I felt strongly about this. Saw parents groups at first hand in the southern states of USA hijacking boards and didn't want that here."*

*"I was incredibly naive. I saw it had potential. However, we need to be trusted to do the right thing for our communities but the Government won't let us. It is like the parent who won't let go of a child who is growing up. Instead of giving us the trust we are being hedged in with more and more regulations."*

*"You may well ask! I never dreamed it would be like this. I was asked to stand by the previous principal."*

**QUESTION: Will you stand again? (Why, why not?)**

From the thirty questioned, (principals have no choice), 8 will definitely stand again, 9 won't stand again and the remaining 13 were not sure. The responses were evenly spread between rural and urban schools. The most commonly expressed reason for not standing and being unsure about standing is the work load involved. The second reason given was that responsibilities should be shared and that change of personnel is healthy. For those who are intending to remaining on the boards the experience has been both positive and happy. This comment made by one board member is representative:

*"Certainly will! I like decision-making. The board of trustees at our school operates extremely well. They understand the difference between governance and interference. Our principal is very good and we trust him implicitly and that makes for a very happy*

*experience. Also there is no tension between parents and the board either. Parents are happy for the board to make decisions. It is more a matter of luck than skill."*

For those who have made up their minds not to stand or were not sure the work load featured significantly in their comments:

*"No, far too much responsibility and too much time. The correspondence alone is enormous. My family are fed up with it. It's very stressful."*

*"I'd have to think about it very carefully, the work load has been far greater than we thought. We're not getting enough say in the running of our school, not as much as I thought we might have."*

*"Very hesitant, the amount of work involved is enormous. Much of it is frightening - you ask yourself, is a parent able to handle it. You don't know what you will be asked to do next. I haven't enjoyed some of the tasks we've had to do. Appointing teachers is fine when it goes well but it is awful when it goes wrong."*

## **Summary of the data**

### Background of the Boards

From the data a picture emerges of well educated boards of trustees. Thirty eight of the forty questioned had undertaken some form of tertiary education.

### Equity Policy writing and training

Not all boards had had training in equity issues, although they had gained information about the issues from a wide variety of sources. Rural schools used policies supplied by the rural schools adviser, while in urban schools principals and staff developed the policies before submitting them to the board. Principals tended to collate and write the final editions. Most schools then filed them for later reference. At this stage little change has

been reported as a result of the exercise. Most boards felt the actual writing of the policies was a difficult task, partly because of unfamiliarity with the issues, but more especially with the unfamiliar language which charter goals and objectives were couched in. Half of the schools in the sample have not set review dates for equity policies.

#### Definition of equity

Twenty one of the forty questioned interpreted equity as equality of opportunity. Seven more had developed this response by adding a comment which indicated an awareness of the changing definition of equity. The remaining twelve responses were close to the definition contained within the charter.

#### Charter equity goals

The majority of trustees were not aware both of children who experienced specific disadvantage in their own schools or who did not experience successful outcomes. However, most boards were confident that their schools provided good role models for pupils. Sexual harassment policies and procedures have not, as yet, been fully adopted and implemented in most schools.

#### Community involvement

Communities have had little input into writing equity policies. Publication of them, in most cases, has been confined to using newsletters and foyer displays of the policies, with sheets available for comment. Rural trustees felt that they were representative of their communities while urban boards expressed concern at the non-representation of some groups within society, particularly Maori and solo parents.

## 5 An Illusion of Equity Through Policy Writing

*"Equity: This is the application of the principles of fairness. In schools it involves the provision of unequal resources to students so that fairer outcomes can be achieved."*  
(Charter Framework, 1989, p23.)

The charter framework has provided a definition of equity for trustees and schools. However the data from the interviews revealed that this was not a shared definition, certainly not shared by over half the trustees who described equity as equality of opportunity. Tomorrow's Schools sought to replace the notion of equality of opportunity with equity but as yet it appears there is no general acceptance of this concept.

*"Equity objectives will underpin all policy related to the reform of education."*  
(Tomorrow's Schools, 1988, p25.)

Beeby described equality of opportunity as one of the myths which has been a driving force in New Zealand's education system since it was articulated by Peter Fraser in 1939. (Renwick, 1986.) Beeby describes equality of opportunity as a unifying device which formed the basis of subsequent policies. As he saw it, the myth could be widely interpreted yet still provide a coherent framework in which educationalists could work and gain public acceptance for their ideas. As research has repeatedly shown this myth was never converted into reality, and it was this particular point that Treasury noted as part of its rationale for reforming education in New Zealand. (1987.)

While Beeby's view saw acceptance of such myths a result of consensus, that approach was not shared by others, who saw that myths arose from a conflict view of society in which it provides idealistic solutions to the continual problems society faces. (Shuker, 1987.)



Within boards, as this study has shown, no consensus view has emerged of what equity is. While the research showed that trustees have differing views in interpretations of equity, less than one third of those interviewed defined equity in similar ways to the charter framework. Yet all of these trustees came from boards which had completed the equity policy writing process.

### **Hypothesis revisited**

- \* **Equity practices will be unacceptable in some rural districts**

Most rural trustees were unaware of groups or individuals within their schools who did not experience successful outcomes at school or who had been disadvantaged because of gender, ethnic or cultural or social or family background. This contrasted with urban schools where trustees were more aware of the difficulties some students faced and were knowledgeable about some of the programmes the school was putting into place to help cope with those situations noted above.

The majority of rural trustees saw equity as equal opportunity stating that everyone should be treated in the same manner and that similar opportunities should be provided for all children. These two comments typified rural responses:

*"Everyone, regardless of colour, race etc is treated on the same basis - equal shares for everyone."*

*"Well, I'm a very practical person, if we are going to dig out the jumping pit we are all blokes together. I don't see people as different."*

While no comment was made that indicated rural negativity to equity, responses made to the questions concerning a

definition of equity revealed a more limited notion of the concept.

- \* What people write in policies may not be in harmony with their personal beliefs

The content of the policies and the responses given indicate a difference between what the policies contained as goals and objectives, and trustees' own commonsense understandings of equity. There were probably several reasons for this. In the first place marked variations occurred in the range of training that boards took part in. Principal and staff representatives were much more likely to have taken part in training than chairpersons and other trustees. Secondly, information about the issues came from a wide variety of sources with no common pattern emerging. Finally, the policies were mainly written by principals and their staffs which effectively removed chances for issues to be discussed and debated by trustees. Boards deliberately delegated this task because they felt they had neither the time nor the knowledge of the issues involved.

- \* Some policies will be more difficult to accept than others. Sexual harassment, as an issue, tends to be avoided by many schools. The provision of suitable role models occasions anger with some boards because it disturbs the notion that what they are already practising is acceptable.

A wide range of responses from trustees revealed that no one policy caused greater difficulty than another. Trustees opinions differed within boards as well as between them. Half of the rural boards experienced little difficulty with any policy, which may stem the fact that they all adopted existing policies. Two boards in that

rural sample cited sexual harassment as a cause for concern. As one rural principal explained:

*"Sexual harassment was the most difficult to explain to some board members."*

Responses from urban boards indicated a wider spread of policies which caused concern. Although sexual harassment was mentioned so too were equitable outcomes. Two boards were yet to write sexual harassment policies. On balance then, some boards did experience difficulty with some policies but no clear patterns emerged as to which one.

- \* There will be significant differences in understanding equity between rural and urban schools.

As mentioned earlier, there was a difference between urban and rural schools in their responses to equity. However this statement must be tempered by the knowledge that the rural schools selected in this sample were small, the communities that support these schools were also small, and yet these small schools have exactly the same charter requirements as their larger urban counterparts. Schools which have one or two teachers and few advisers are being compared with those who have between eight to twelve staff and who have a much easier access to both knowledge and resources.

Rural schools used similar policies supplied by the rural schools advisers. Boards by and large adopted these with little change. Rural trustees did not have the same amount of training as urban trustees and the timing of these courses left a lot to be desired. As one rural principal said:

*"The board of trustees attended courses run by State Services, however they were too early. When they were needed there was nothing."*

Finally, as reported earlier, rural trustees were not as aware of equity issues as those trustees in city schools.

- \* In most schools a gap will occur between the rhetoric of the policy and programme practice.

The scope of this research did not extend to examining programme practice because most of those interviewed considered it too soon to look for these links. It is hoped that reports from the Education Review Office will provide useful data on this in the future. Trustees did have some interesting points, though, to make about the equity policy requirement. In common with Wylie's study, this research found that boards did not see the need for formalising what they considered was standard practice in their schools anyway. (Wylie, 1990.)

- \* Policy writing will be difficult for some boards. Some have copied the policies of others rather than write specific ones for their own school. As a result, there may be policies in schools which do not suit the needs of those schools.

Trustees did not write their own equity policies. They were written by both principals and staff in urban schools. In two schools some input came from the community. In the case of rural schools modified policies were developed from the models supplied by the rural schools adviser.

Trustees did find policy writing for equity difficult. There were two reasons for this: for some the language used in the charter goals and objectives was inhibiting and unfamiliar; for others, it was the pressure of work which came from the policy completion requirements of the charter. This is also the reason why rural schools, in

particular, used policy packages supplied by the rural schools advisers.

Whether the new equity policies will suit each particular school still needs to be determined. However, with one exception, policies have all been filed in either a policy book or policy file, and schools now consider that this particular task is completed.

### **Educational policy making**

Prunty describes educational policy making as

*"an exercise of power and control directed towards the attainment or preservation of some preferred arrangement of schools and society." (Prunty, 1984, p3.)*

Policies which are about changes and/or improvements will be resisted unless there is some shared understandings and consensus about basic values. The research team working on the CRRISP project found that

*"Change will only occur if groundwork is carefully prepared, if resources are in place and if time and opportunity is given for 'quality reflection' to take place. (Ramsay et al, 1990, p33.)*

Yet the evidence so far in this research suggests that this stage has not been reached. Trustees do not have shared understandings of equity; they delegated the policy writing task to principals and staff. Insufficient training was provided for trustees, and what was provided was frequently at an inappropriate time. However, it must be remembered that boards were charged with the task of developing and writing forty separate charter policies by the end of 1991. (Six of these policies were for equity.) The total time given for this task was two and half years. Trustees therefore had thirty months in which to write forty policies. A herculean task which certainly has not allowed

for "quality reflection", policy making has been rushed through so the deadlines set within the charter framework can be met.

The charter is a control document. (Bates, 1990.) It has been written to remove any legal obligation on the part of the state. It is concerned with telling schools what to do, but does not provide the resources and a reasonable time frame in which to carry out its requirements. It is a state-provided document which does not permit alteration of compulsory sections. (1989 Education Act, 63.) While many would not disagree with much of its thrust, its undemocratic approach which is set in a managerialistic framework is at odds with education, which is about values.

Community partnership, involvement and local decision-making were part of the promised reforms. Yet the ideologies which lie behind the new reforms are not from the liberal-consensus point of view but rather from government's wish to tighten control over education. (Treasury, 1987, p57.) Within the reforms themselves there are several ideological tensions which are not as yet resolved. Codd argues that a new educational settlement has not been reached because of these factors. The conflict of values between economic management and the inherent values of educational democracy contained within the substance of the reforms themselves highlights these tensions. (Codd, 1990b, p18.) New Right ideas have been forced on to a liberal democratic tradition.

Within the charter a full definition of equity is given, but the charter requires that it be delivered in a managerialistic setting. For trustees there is a contradiction. Equity is about values, but the policy writing methods generally employed by boards made it difficult to reach the shared understandings which are necessary for acceptance of these values. Rural schools in the research used similar policies provided by the rural schools adviser. Boards generally were grateful to have



these because they did not have the time and had received insufficient training to develop these policies. Urban trustees delegated the task to principals and staff because they too did not have the time, knowledge and training. The one exception to this in the selected sample had found experts within the community who were able to assist. Nevertheless, the policy writing was still completed by both the principal and staff of that particular school.

The Lough Report designed to report on the reform's progress in 1990 focused on control through accountability. Despite the title, Today's Schools, this report examines those measures which control the administration in schools. Students, the *raison d'être* for schools, are rarely mentioned. It is educational outcomes, not defined, which interest the report writers in their search for administrative frameworks, administrative systems and operational objectives. The language used in this report highlights the concepts and ideas of accountability which are intended to instruct trustees and schools about the ethos of economic management. Phrases such as

*"Only when all the elements of effective administration and management are present will the benefits of the reforms be realised in higher quality outcomes." (Lough, 1990, p16.)*

permeate the report. There is no evidence offered that all the elements of effective administration and management need to be present before higher quality outcomes are realised, or indeed that higher quality outcomes will occur even if they are present.

Prunty's analysis is that theoretical orientation to policy is

*"based on assumptions of the functionalist paradigm and is unduly influenced by systems analysis. We argued that functionalism and systems theory are inappropriate*



*perspectives for the analysis of educational policy because their assumptions are inherently inimical to understanding or acting upon the educational problems that policies are meant to remedy." (Prunty, 1984, p35.)*

The Lough Report, "influenced by systems analysis", has indicated future paths for the reforms in educational administration to take.

*"It has a fanatical preoccupation with recording and reporting." (Codd, 1990b, p19.)*

Values, the very stuff of education, are only seen in terms of what people produce. Policy is separated from operations within the charter context. Therefore equity policies do not need to be accepted in value form, rather they are tasks which have to be completed in order that charter goals and objectives can be met. They appear to have little to do with the daily life of the school.

*"How we reach objectives will give substance and meaning to those objectives. (Codd, 1990b, p23.)*

It is for this reason that equity policies as they are currently written can create little change on our schools, because as Codd tells us, it is the way we reach objectives which gives meaning to the policy, not the final result. The processes which trustees were forced to undertake when writing and developing policies were too rapid for acceptance of any change to occur. Change needs time, to reflect, to develop, to discover and to evaluate.

*"We have provided ample evidence to demonstrate that successful collaborative decision making can only occur when people have time to reflect, when they have time to make or discover appropriate materials, when they have time to develop necessary contacts, and when they have time to plan and evaluate.(Ramsay et al, 1990, p21.)*

As mentioned earlier, people must own the change if it is to happen, but the charter time frame has forced trustees to delegate much to principals and staff. According to

Macpherson, legitimacy of a policy depends on both internal and external coherence and when the 'state' or system abrogates responsibility the policy's legitimation disappears. (Macpherson, 1991, p22.) Within this criteria, equity policies cannot be considered to be legitimate because of the incoherence within both the charter and the educational reforms themselves.

Values are cultural in nature, coming as they do from our history. (Bates, 1991.) The charter, as a contract, removes the cultural aspect and thereby reduces policy making to a reflection of current scientific management techniques of task selection, delegation and individual choice. Much of the present approach to writing policies in New Zealand is based on the techniques advocated by Caldwell and Spinks which embraces a reductionist method to policy making. Within their framework, a four phase process, a set formula was provided for boards to emulate. The benefits, they believed, would illustrate that the school was being operated in an efficient, orderly and businesslike manner. This reductionist approach has ensured that equity policies have been divorced from their real purpose, which is to provide a more equitable education in schools.

As Corson has pointed out, the design of coherent and holistic policies is made more difficult when differing values and views are held. He argues that the task will be much easier if we

*"Improve our commonsense knowledge about the problem by gaining a thorough understanding of the context in which the problem is located," (Corson, 1990, p7.)*

The politics of education, justice and equity affect schools and their communities and cannot be kept out of the policy making process. Yet nine of the ten schools interviewed drew little from the communities in which they were situated. In part, this came from the shortened time

frame, but more especially it came from the lack of real support with which trustees themselves were provided to enable them to confidently approach their communities about equity issues. Yet

*"Values do not float free of social context." (Ball, 1990, p3.)*

The incoherence in the reforms' educational policies are reflected both in the charter and in the writing of the equity policies. Ball asks an important question:

*"whose values are validated in policy and whose are not," (Ball, 1990, p3.)*

when looking both at the reforms themselves, but more particularly at the particular policies that trustees have developed.

The influence of the new right ideologies are clearly seen in the scientific management path that the educational administrative reforms in New Zealand have been pushed down. The minimalist state has abrogated its responsibilities in those things it cannot control. Those responsibilities include equity issues. Through the charter the state has delegated its responsibilities for issues such as equity to boards of trustees, without ensuring that boards have first been provided with training and financial support. The state has given its problem to boards. However the state has kept control of matters to do with staffing and finance. It controls the staffing levels and financial considerations through its own budgetary constraints, the Public Finance Act with its public sector accounting concepts, and individual school charters. The emphasis here is on reporting in terms which are accountancy based. Trustees, who were promised freedom to write their own charters and have control over their own school resources have been misled.

Individual choice is paramount within the reforms and this position does not allow for community involvement as it was originally envisaged within the rhetoric of the Picot Report. We are told that the creation of more choice will ensure

*"greater equity and efficiency." (Picot, 1988, p4.)*

With the choice of both efficiency and equity this research has shown that efficiency in the shape of completed written equity policies has been the clear winner. The time needed for considered reflection and consultation was never available given the enormity of the total policy writing with which trustees were faced. Without a doubt people have been excluded from the process because of time, and also from lack of knowledge of the issues involved. The values which are embodied in equity policies are not for those who have the real needs in society, but rather they belong to the architects of the reforms. The larger educational policies such as Tomorrow's Schools and Today's Schools have shaped the smaller policies developed within the charter framework.

Writing policies can be made compulsory but if the boards' understandings are not complete, the language used is inhibiting, and the purposes of the policies are in conflict with some personal beliefs of those who write them, the policy writing exercise is meaningless, and will have little marked effect on schools. The charter will continue to perpetrate the hegemonic role that the state plays in legitimising the equity policies within it. The charter is a legal undertaking, enshrined in the Education Act (1989), and, because it is legal the state can say that it has done its best to maintain equity, which will in turn be the state's attempt to gain consent of those groups who have the most to lose - groups such as women, Maori, Pacific Islanders and the disabled.

### **Reworking equity policies**

The technology of scientific management - charters, policies and the like - is not an appropriate mechanism for delivering equity in our schools. Personal knowledge and critical consciousness are not developed by scientific management and control. (Habermas in Corson, 1988.) Rather, they are developed by involving a 'community' in seeking common accord and understanding.

Policy methodology in schools needs reworking. It is not sufficient to use a particular method without reference to both human values and practising the politics of exclusion.

In the end, the method is not nearly as important as the people who are involved working together and for whom the particular policies are written. The key to successful policy writing will be involvement of those affected and the time taken to work through issues in order to accommodate differing points of view. As the CRRISP project has shown, collaborative models can work but they do take time. It does not matter if equity policy development takes years, providing the policy is built on a sure foundation of mutual understanding and collaboration. We have all taken some time to develop our views so it is logical therefore to presume that to change our views will also take time.

Equity policies need to be divorced from the charter so they are freed from the mechanistic and stilted approaches which dominate it. While the charter approach lends itself to matters of property and finance it is inappropriate for matters of equity. Instead, equity policies should be developed alongside curriculum policies (which should also be removed from the charter). Bates describes education as both a technical and cultural project. The technical equates to knowledge and skills while the cultural links knowledge and skills with values. (Bates, 1991.) By

writing equity and curriculum policies as a separate entity a more holistic approach to education is possible.

Even the word 'policy' now seems unsuitable for those matters connected with equity and curriculum. The Caldwell and Spinks policy methodology has had a considerable impact on current policy making, and it may well be time to look for either old or new expressions which will return both substance and meaning to equity decisions and programmes. Whatever terms are coined it will be important to forever sever the link with technical and scientific policy making which ignores values.

Trustees should also have ready access to the research from the CRRISP project for several reasons. The first is the knowledge that adoption of others policies will not be nearly as effective as adapting them. CRRISP showed quite clearly that the adaptation process can help to change approaches and attitudes while the straight adoption of the ideas of others will not effect successful change. Secondly, that time is needed to reflect on desired changes in order to vary thoughts and ideas. If this approach could have been followed then trustees would have had time to be part of the equity policy writing process. Thirdly, that outside assistance can be helpful in effecting change. While the rural schools adviser had supplied a selection of policies for rural schools to assist them, the difficulties which several trustees found in both the level of language used in the charter and the concepts which the charter was trying to promote could have been avoided, if a skilled outside facilitator had been used.

Knowledge and control through the charter mechanism supports minority social interests and excludes the interests and understandings of the majority of the school's population. Active consultation has to happen outside the charter framework both within boards themselves as well as within the whole school community to break down



barriers. These consultative processes need to include those who are presently excluded, assisting understanding for those same groups, as well as promoting discussion of the issues involved.

Adequate training and support for trustees has yet to be provided by Vote Education. Boards have faced considerable difficulties. Unrealistic time frames, financial and staffing restraints, as well as changing Government and Ministry of Education policy have made their position quite untenable at times. Trustees do want developmental and ongoing support to equip them confidently for their governance role.

While the changes already suggested in this chapter will support trustees in their interpretation and their provision of equity in schools, the very basis of each person's rights in our society - equity - must be supported, and the current emphasis on scientific management, charters and mechanistic policy writing methods strongly resisted. Reducing the writing of equity policies in our schools to the level of a compulsory task which have to be completed inside a given time frame is to demean the culture and heritage of all New Zealanders.



## Appendix 1

Copy of a letter sent to participating schools after verbal permission had been granted.

Name

Chairperson/Principal

Board of Trustees

School

Address

Dear .....

Research for Thesis

I am a masterate student at Massey University and am interested in doing some research into equity policies which have been written by boards of trustees. Last year I became aware of the concerns that boards expressed concerning the actual writing of these policies and the issues of equity.

I would like to stress that this research is being undertaken by me as a private individual and is being supervised from Massey University. It has no connection at all with the Ministry of Education who employ me.

I would like to interview four members of each board: the chairperson and another board member as well as the principal and the staff representative. All information given to me will be treated in the utmost confidence and no person or school will be identified in any way. It is intended that 10 schools (rural and urban) will take part in this research, and the results will be written in thesis

form. At the end of the programme I would like to bring back the results of the research to the boards who assisted with it.

If you are agreeable to helping with this research I will be able to visit your school (date). I will follow this letter with a phone call to finalise details.

Yours sincerely

Carol Moffatt

## Appendix 2

### Interview Schedule

Questions 1 to 6 will be developed during the interview.

- 1 Gender
- 2 Ethnicity
- 3 What type of primary and secondary school did you attend? (urban/rural)
- 4 How many years did you attend secondary school?
- 5 Did you have any further training after you left secondary school?
- 6 What is your present occupation?

### Equity Policies

- 7 What training has been provided for the board and staff on equity issues?
- 8 Where did you get your information on equity from?
- 9 How were the equity policies written? What methods did you use? Did one person lead, or did you work as a group?
- 10 Who actually wrote up the policies?
- 11 Which one of the equity policies was the most difficult to write? Why?
- 12 What were the next steps after the policies had been written?
- 13 Have there been any changes in the school since the policies have been written? Describe these?
- 14 What are your views about boards writing equity policies?
- 15 What does the term "equity" mean to you?
- 16 How does the board plan to review and update its equity policies?

### Charter Equity Goals

Goal A: To enhance learning by ensuring that the curriculum is non-sexist and non-racist and that any disadvantage experienced at the school by students, parents, or staff members because of religious, ethnic, cultural, social or family background is acknowledged and addressed.

- 17 Do you know of anyone who has been disadvantaged because of gender, ethnic, cultural or social or family background?

Goal B: To enhance learning by ensuring that the school's equity policies and practices seek to achieve equitable outcomes for students of both sexes; for rural and urban students; for all students irrespective of their religious, ethnic, cultural, social, family and class backgrounds and irrespective of their ability or disability.

- 18 Are you aware of groups in the school who do not experience successful outcomes?
- 19 What is being done to help these groups?
- 20 Are there groups of students who do not participate in the full range of activities?

Goal C: To enhance learning by providing role models, such as girls, women and people from different ethnic groups in positions of leadership and authority and boys and men a caregivers so that children can understand the meaning of equity in behaviour they observe from day to day.

- 21 Does the school provide good role models for students?

Goal D: To enhance learning by developing policies and procedures which aim to eliminate any sexual harassment of students, parents, or staff members in the school and to provide appropriate and proper grievance procedures to handle complaints of sexual harassment.

- 22 What steps are taken to ensure that the policies are implemented?

### Community

- 23 What input has the community had in writing equity policies?
- 24 How is progress on equity reported to the community?
- 25 What community groups do you belong to?
- 26 What particular group or groups do you represent in the community?
- 27 Are there any groups in the community that are not represented on the board of trustees?
- 28 Why did you stand for election?
- 29 Will you stand again? (why or why not)

### Appendix 3

Equity Goals and Objectives (Charter Framework, 1990, p10/11.)

Goal A: To enhance learning by ensuring that the curriculum is non-sexist and non-racist and that any disadvantage experienced at school by students, parents, or staff members because of gender or religious, ethnic, cultural, social or family background is acknowledged and addressed.

#### Objectives:

- a By the end of 1990, state a policy on equity regarding learning and teaching programmes and the selection of learning materials to ensure they are non-sexist and non-racist
- b By the end of 1990, establish a policy on equity regarding the access by all students to learning programmes and physical resources
- c Every year review and update policies in the light of any observed or expressed claims of disadvantage

Goal B: To enhance learning by ensuring that the school's policies and practices seek to achieve equitable outcomes for students of both sexes; for urban and rural students; for all students irrespective of their religious, ethnic, cultural, social, family and class backgrounds and irrespective of their ability or disability.

**Objectives:**

- a By the end of 1990 and once each year thereafter, identify groups of students who do not experience successful outcomes from the school, or who are prevented or discouraged from participating in the full range of activities at the school.
- b By the end of the first term in 1991 have developed and implemented policies which aim to achieve equitable outcomes for students identified in objective (a) above and which may involve the allocation of additional resources to those students.
- c By the end of 1991 and once a year thereafter, evaluate and report to its community on the extent to which policies have been successful, and to review and amend them and delete them accordingly.

**Goal C:** To enhance learning by providing role models, such as girls, women and people from different ethnic groups in positions of leadership and authority and boys and men as caregivers, so that children can understand the meaning of equity in behaviour they observe from day to day.

**Objectives:**

- a By the end of 1990, to have developed a policy on role models.
- b Review annually, the policy on role models.

**Goal D:** To enhance learning by developing policies and procedures which aim to eliminate any



sexual harassment of students, parents, or staff members in the school and to provide appropriate and proper grievance procedures to handle complaints of sexual harassment.

Objective:

By the end of 1990, publish a clear statement of policies and procedures which will be followed in this school to safeguard against sexual harassment.

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