

# Partnerships 21

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*This article provides a concise account of the program being introduced into South Australian schools and educational institutions during the Year 2001. This program, referred to as 'Partnerships 21', builds on developments that have taken place during the past 30 years in the schools of South Australia and that provide increased opportunity for local management of schools and educational institutions. Eight guiding principles have been advanced to ensure that the developments under the program occur in a consistent and coherent manner. The strengthening of local management is delivered through the three key components of the program: partnerships, quality improvement and resource flexibility. It is optimal for schools and institutions to join the scheme, and differences in the management and operation for members and non-members of the Partnerships 21 program are identified.*

management of schools, local management, partnerships 21, resource allocation, quality in education

## INTRODUCTION

As an educational reform, local school management is not new. Its various forms are already evident in the United Kingdom, Canada and the United States of America and, more recently, in the Schools of the Future in Victoria and Tomorrow's Schools in New Zealand. Although Partnerships 21 represents the South Australian version of these initiatives, it is helpful to understand that local management in South Australia also is not a new phenomenon. Under the Education Act, 1972, school councils have operated in South Australia since 1974 and already possess considerable authority, including the provision of advice to the Principal on the school's educational program and also the formal approval of the school's budget. The Freedom and Authority memorandum in 1970 from A.W. Jones, the then Director-General, assigned significant authority to the local school to develop local teaching programs derived from broad departmental curriculum frameworks. Since the mid 1980s, schools have operated consolidated bank accounts and exercised direct responsibility for procurement and financial transaction. For the last ten years, schools have exercised a degree of local selection when filling leadership and teaching vacancies. Partnerships 21, therefore, can be best understood as a strategy for moving the South Australian education and care system forward into a more cohesive and coordinated system of local management.

## IMPLEMENTATION OF PARTNERSHIPS 21

The origins of Partnerships 21 arose from the work of the Ministerial Working Party on Local Management that the South Australian Minister for Education, Children Services and Training, the

Hon Malcolm Buckby, commissioned in 1998. The Minister set the following guidelines for the Working Party's investigation and report on local school management. He charged them to develop a uniquely South Australian model of local school management that possessed the following qualities:

- educational benefits must have primacy over all others;
- schools must remain responsible to the Department of Education, Training and Employment;
- teachers in schools must remain employees of the Department of Education, Training and Employment;
- the broad curriculum goals of the Department of Education, Training and Employment must be achieved;
- incentives must exist for schools to make savings through new efficiencies; and
- disadvantaged schools must be significantly better off.

On 20 April 1999 the Premier of South Australia and the Minister for Education, Training and Employment launched Partnerships 21 as the South Australian model of local management based on the general directions of the ministerial Working Party Report. The implementation timeline allocated to develop the detail of the Partnerships 21 model, from launch to inception, was eight months. From the outset it was emphasised that the model would be evolutionary and that it would be shaped by an interactive partnership between staff in state office and leaders on local sites. Seven implementation working groups in the areas of Accountability, Community Partnerships and Governance, Professional Development and Training, IT System Support, Global Budgets, and Asset and Financial Risk Management, Human Resource issues and Country issues developed the detail of Partnerships 21. Their work was overseen by a Steering Committee that the Chief Executive chaired. Over 200 people, representing a wide cross-section of the South Australian community, worked on these groups.

### **PARTNERSHIPS 21 PRINCIPLES**

A set of eight guiding principles were approved by the Steering Committee to ensure that the developmental work for Partnerships 21 occurred in a consistent and coherent manner. These eight principles continue to apply to its operation and development. They are:

#### **1. Building on success**

Partnerships 21 will:

- Build upon past strengths and best practices when implementing new structures and processes for the local management of sites and services.
- Strengthen the connections and strategic alliances between sites and services in achieving high quality learning outcomes for students and children and for optimising the management of their resources to do so.

#### **2. Improved learning outcomes**

Partnerships 21 will:

- Strengthen a culture of achievement in sites and services in which leaders and teachers measure, and with parents, reflect on and target action to improve student learning outcomes.
- Optimise the efficient use of resources to achieve high quality learning outcomes for students.

### **3. Partnerships**

Partnerships 21 will:

- Strengthen participation by students, parents, community members and staff of all cultural backgrounds in an open democratic process of decision making at local sites and services.
- Promote the development of ethical partnerships with clusters and networks of sites, services, businesses and other community and departmental organisations.
- Promote voluntary strategic alliances between sites, services, businesses and the broader community.

### **4. Fairness**

Partnerships 21 will

- Reallocate resources differentially to assist children and students in urban, rural and, in particular, isolated sites to achieve the standards and benchmarks of the South Australian Curriculum Standards and Accountability Framework.
- Reallocate resources differentially to assist all children and students in urban, rural and, in particular, isolated sites gain access to pathways that best assist their development and success.

### **5. Maximising the local**

Partnerships 21 will:

- Maximise decision making at the local level unless there are compelling reasons for state office to make resourcing or other decisions.
- Remove any unnecessary restrictions on the flexibility of local sites and services to optimise their resources to ensure high quality learning for their students and children.
- Strengthen the state office's service role to sites and services.

### **6. Accountability**

Partnerships 21 will:

- Strengthen the ability of sites and services to provide their local communities with information that explains their performance in providing high quality care, education and training against agreed benchmarks.
- Strengthen local sites and services' ethical and professional use of performance information and benchmarks as part of their process of self-evaluation and continuous improvement in student learning outcomes.
- Strengthen the ability of sites and services to provide state office and the people of South Australia, through the Parliament, with information about their performance in providing high quality care, education and training.

### **7. Efficiency**

Partnerships 21 will:

- Optimise the efficient use of resources at the local and central levels of operation.
- Strengthen decision-making practices and management structures for the efficient use of resources both in and between local sites and services.

## 8. Transparency

Partnerships 21 will:

- Ensure systems and processes that service local management at state office are open, defensible and ethical.
- Ensure sites and services provide processes and information that are accessible to all groups within their communities and that are open, defensible and ethical.

### KEY COMPONENTS OF PARTNERSHIPS 21

From the outset it has been emphasised that Partnerships 21 is committed to strengthening the state system of education and care. The following requirements are made clear in the model.

- Partnerships 21 schools and preschools continue to operate within the legislative requirements and departmental policies that apply to all sites.
- Partnerships 21 schools and preschools continue to teach programs consistent with the department's broad curriculum goals as defined by the South Australian Curriculum Standards and Accountability Framework.
- Children and students continue to have right of access to their local neighbourhood school or preschool.
- The department remains the employing authority.
- Increased staffing flexibility occurs within current industrial agreements.

Within these requirements, the Partnerships 21 model provides a coherent framework for strengthening local management of schools and preschools through the key components of partnerships, quality improvement and resource flexibility.

**Partnerships:** The Partnerships 21 project builds on South Australia's long history of involving of parents and community members in schools and preschools through school councils and preschool management committees. It extends this practice by redefining concepts of governance, management and leadership in the context of local management in school and preschool communities and the system as a whole. The focus for this increased emphasis on partnerships with the local community is the strengthened role of the school's governing council. Under Partnerships 21 its role is extended from giving advice to the Principal to one where it exercises authority for strategic planning, policy determination, monitoring and accountability.

**Quality improvement:** The implementation of Partnerships 21 has been tied to the department's introduction of a new Framework for Quality Improvement and Accountability. The new framework is based on a three-year strategic plan, known as the Partnerships Plan, which is an extension of its predecessor, the annual Statement of Purpose. The Partnerships Plan is a companion document to the Services Agreement, which identifies the mutual obligations that Partnerships 21 schools and state office have of each other. The Partnerships Plan and Services Agreement, are signed by the chairperson of the governing council, the Principal and the Chief Executive. The other key features of the Framework for Quality Improvement and Accountability are annual operation planning, monitoring and accountability.

**Resource flexibility:** Under Partnerships 21, schools are allocated a global budget and the authority to determine how it will be administered. The global budget allocates resources to a school, based on a new allocative mechanism using the following components: a base allocation for each site; a base allocation for each student according to their year level; and additional allocation for students with special learning needs, for example, Aboriginal students, students with

disabilities, English as second language students, students from low socio-economic backgrounds; and funding for special programs that are unsuitable for a per capita allocation.

Through the integration of these key components, the school or preschool is given the best opportunity to improve the learning outcomes for each student. The panels that follow summarise the relationships between the Governing Council of an Institution and the Principal or Director of the Institution and the differences in management and operation between the Partnerships 21 and Non-Partnerships21 schools and institutions.

### PARTNERSHIPS OVERVIEW

#### Panel 1. Governance

Governing Council	Principal / Director
<p>Is accountable to the Minister for developing, negotiating and meeting the objectives and targets of the Partnerships Plan and Services Agreement by:</p> <ul style="list-style-type: none"> <li>• strategic planning and the allocation of resources,</li> <li>• monitoring key indicators and levels of client satisfaction,</li> <li>• reporting to department and community.</li> </ul> <p>Is responsible for local policy development within broad DETE frameworks (eg curriculum and program initiatives)</p> <p>Participates in the appointment of key leadership positions.</p> <p>Has employer responsibility for staff employed by the governing council.</p>	<p>Is accountable to the Chief Executive through the designated Executive Director for the educational leadership and management of the site (DETE sites only) and the development of the Services. Agreement resulting in:</p> <ul style="list-style-type: none"> <li>• quality teaching programs,</li> <li>• quality learning outcomes for all students,</li> <li>• a safe learning and working environment,</li> <li>• effective operational and day-to-day management,</li> <li>• supervision of all staff on site.</li> </ul> <p>Is accountable to the governing council for the:</p> <ul style="list-style-type: none"> <li>• implementation of the Partnerships Plan and Services Agreement,</li> <li>• implementation of local policy,</li> <li>• provision of accurate and timely information and advice,</li> <li>• supervision and development of staff employed by the governing council (as delegated).</li> </ul>

#### Panel 2. Accountability

Governing Council	Principal / Director
<p>Is accountable to the community and the Minister for meeting the objectives and targets of the Partnerships Plan and Services Agreement.</p> <p>Is responsible for consultation with the community and ensuring that decisions take into account the range of community views, with particular attention to the views and needs of disadvantaged and minority groups.</p> <p>Is accountable to the community for ensuring that the educational needs of students are addressed.</p>	<p>Is accountable to the Chief Executive for the education outcomes of students.</p> <p>Is accountable to the Chief Executive for the educational leadership and performance management of staff by:</p> <ul style="list-style-type: none"> <li>• working with staff to develop and deliver quality educational programs which meet students' needs,</li> <li>• reporting to the school community on curriculum developments,</li> <li>• ensuring the provision of quality training and development for staff.</li> </ul> <p>Is responsible for monitoring and reporting on student learning outcomes to the Governing Council and Chief Executive.</p>

**Panel 3. Monitoring and Evaluation**

<b>Governing Council</b>	<b>Principal / Director</b>
<p>Monitors progress of the Operational and Partnerships Plan.</p> <p>Monitors the budget and variations to the budget.</p> <p>Monitors the current and future financial position.</p> <p>Oversees and participates in annual internal reviews.</p> <p>Participates in external reviews.</p> <p>Meets information and accountability requirements.</p>	<p>Reports to Governing Council on key participation, learning, training and care outcomes.</p> <p>Provides timely and accurate information and regular reports on issues relevant to the responsibilities of the Governing Council.</p> <p>Is responsible for performance management of staff including staff development and the allocation of duties.</p> <p>Manages annual internal reviews.</p>

**Panel 4. Setting the Strategic Direction**

<b>Governing Council</b>	<b>Principal / Director</b>
<p>Is accountable for setting of the broad direction and vision of the school/preschool and for the development, monitoring and review of the Partnerships Plan. Ensures the inclusion of DETE priorities within a local context. Approves the Annual Operational Plan and endorses the budget and variations thereto.</p> <p>Enhances and supports the program of the school/preschool through, for example:</p> <ul style="list-style-type: none"> <li>• alliances and contracts with business and other agencies and services,</li> <li>• alliances and contracts with other DETE sites and services,</li> <li>• fundraising and sponsorship within nationally agreed guidelines,</li> <li>• setting materials and services charges.</li> </ul>	<p>As educational leader, provides advice and information to the Governing Council to assist in the development of policy.</p> <p>Is responsible for the development of operational policy and action plans to achieve the objectives and targets of the Partnerships Plan.</p> <p>Is responsible for financial management and expenditure consistent with the Annual Operational Plan and approved budget.</p>

**Panel 5. Setting Local Policy**

<b>Governing Council</b>	<b>Principal / Director</b>
<p>Establishes local policy within broad DETE framework, eg:</p> <ul style="list-style-type: none"> <li>• codes of conduct for Governing Council members,</li> <li>• client and Governing Council employed staff grievance procedures,</li> <li>• financial policy (investment etc),</li> <li>• curriculum policy (eg emphases, priorities),</li> <li>• human resource policy,</li> <li>• facilities development and maintenance policy,</li> <li>• school dress code,</li> <li>• school discipline policy and student/children behaviour management code.</li> </ul> <p>Allocates resources to support local policy implementation.</p>	<p>As educational leader, provides advice and information to the Governing Council to assist in the development of local policy.</p> <p>Is responsible for financial, physical and human resource management.</p> <p>Is responsible for the implementation of:</p> <ul style="list-style-type: none"> <li>• school dress code,</li> <li>• school discipline policy and student behaviour code.</li> </ul>

**Panel 6. Quality Improvement Overview**

<b>Feature</b>	<b>Partnerships 21 site</b>	<b>Non Partnerships 21 site</b>
Quality Improvement and Accountability Framework	A cohesive, integrated quality improvement and accountability framework expressed through a three year strategic plan, a services agreement between the site and state office, an annual operational plan and an annual report.	A cohesive, integrated quality improvement and accountability framework expressed through an annual statement of purpose and an annual report.
Partnerships Plan	A three year strategic plan incorporating staffing and facilities planning.	An annual Statement of Purpose.
Services Agreement	A formal commitment of resources for one year and a projected allocation for a further two years through a services agreement between the local site and state office.	Formal commitment of resources for no more than one year.
Annual Operational Plan	Annual operational plan integrating resource planning with strategic priorities.	School improvement / action plans for specific purposes as required.
Annual Report	Annual Report	Annual Report
Internal Monitoring	Individual sites design processes to monitor progress against strategic objectives outlined in the Annual Operational Plan and Partnerships Plan.	Individual sites design processes to monitor progress against annual priorities.
External Monitoring	Basic Skills Test. SACE results. Statements and Profiles state wide collection of data. Site review every three years. Site review for specific purposes on request.	Basic Skills Test. SACE results. Statements and Profiles state wide collection of data. Site review every three years. Site review for specific purposes on request.
Curriculum Standards and Accountability Framework	Progress of students will be identified, monitored and built upon.	Progress of students will be identified, monitored and built upon.

**Panel 7. Financial Management**

<b>Feature</b>	<b>Partnerships 21 site</b>	<b>Non Partnerships 21 site</b>
Funding Mechanism and Accountability	A global budget based on a transparent, predictable, output-based formula. Accountability integrated into the Quality Improvement and Accountability Framework.	Many different formulas related to inputs with separated and unrelated accountability measures.
Resource Allocations	<p>P21 sites contribute to developing a new index of educational disadvantage to target better funding to those students with the greatest need.</p> <p>An amount to cover gap between School Card payments and at least the maximum legally enforceable payment.</p> <p>Unacquitted BTS grants paid as a lump sum.</p> <p>Increased allocations for breakdown maintenance and utilities based on per capita formula will be built into the Global Budget.</p> <p>Savings retained by the site.</p>	<p>School Card payments remain the same.</p> <p>Sites will have bills paid as they arise and not be able to retain savings.</p>
Financial Management	<p>A one year firm budget with a 2 year projected budget.</p> <p>An overdraft facility, equivalent to \$240 per student, will be available to Partnerships 21 sites supported by a three year cash flow plan</p> <p>Savings and over expenditure will be carried forward.</p> <p>Monthly and annual financial reports to assist planning and monitoring.</p> <p>Access and training to use cash flow plans and other tools that complement EDSAS finance module.</p> <p>Shared service centre development to share or remove workload associated with increased financial management.</p>	Cash grants for each financial year received at different times, allocated by a range of formula and accounted for by different mechanisms.
Asset Management	<p>Priority for the development of Asset Management Plans.</p> <p>Professional development related to asset management.</p> <p>Accountability for BTS grants built into the Partnerships 21 Quality and Accountability Framework.</p>	<p>No change to present procedures and policies.</p> <p>Sites will use the present acquittal processes.</p>

**Panel 8. Human Resource Management**

<b>Feature</b>	<b>Partnerships 21 site</b>	<b>Non Partnerships 21 site</b>
Industrial Agreements	Existing agreements maintained.	Existing agreements maintained.
Staffing Entitlements	Calculated on basis of staffing documents, and sites given integrated global entitlement for all sites for one year with indicative rolling triennium.	Calculated on basis of staffing documents. Schools receive entitlements for one year. Preschools, each term.
Long Service Leave	Principal / Director approval of any length of time.	State office approval for periods of one term or more.
School Choice Procedures	Includes all vacancies created by completion of teacher tenure, and at least 50 per cent of any other placements.	Vacancies created by the completion of teacher tenure, plus one.
	Increased opportunity to advertise for permanent and limited tenure staff.	Limited opportunity to advertise.
Advertising Leadership Positions	Increasing ability to determine leadership structure and mix of positions. Can advertise at least 70 per cent of leadership positions that become available.	Leadership positions released for advertisement or placement following approval.
Local Choice for limited term SSO appointments	Sites can select SSOs/ECWs for positions that are of a minimum of two terms, up to 41 weeks.	Continue to be centrally managed short term appointments.
Ancillary staff classifications	Access to a greater range of SSO classifications from SSO 5 and beyond.	Maximum SSO 4.
Appointment of short-term staff	Principals can appoint staff to short term positions.	Managed by state office.