



Evidence, Data and Knowledge

Overview for incoming Deputy Secretary

– Te Pae Aronui

September 2021

Released under the Official Information Act 1982



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Introduction

About EDK

The Evidence, Data and Knowledge Group (EDK) is the Ministry of Education's engine room for data, information and evidence.

The outputs (insights, data and evidence) from the group inform policy development and practice. These aid the achievement of positive educational and social outcomes by helping the Ministry, Ministers, ākonga, parents/families/whānau, communities and sector understand and use all that we know about learners and their needs to inform decisions, actions, and investment.

Our products and services include data and information, reference resources, research, forecasting, insights and analysis on education system related matters, along with advice and assurance on information management, safety, and privacy of data and information - keeping the Ministry, our customers, and – most importantly ākonga and whānau who are the owners of information we collect – safe. Trust and confidence are vital. Data users want to know that our data and processes are robust and reliable. Data owners (eg ākonga, whānau, hāpu and iwi) want to know it's appropriately collected, well-managed, kept safe and private, and used appropriately.

Data maturity and EDK's recent evolution

The Ministry is coming off a relatively low level of data and information management maturity, as measured using a DIA produced government model. It noted that progress is being made,

9(2)(g)(i)

A decision in 2017 was made to invest in improving systems and infrastructure. Among other things this has resulted in:

- the development of the *Education Data Warehouse* (enabling the efficient, safe and secure management, quality control, authorised and permitted access, and bespoke cross referencing and analysis between multiple datasets)
- Te Rito (a platform that enables information about ākonga to travel with them throughout their education journey and be available when needed, by those authorised to access it, to support the multiple and unique needs and talents of individual ākonga and their whānau), and
- an increased focus on automation, including supporting education providers to collate and provide information and data to the Ministry, and in reporting and data service provision.

The majority of this infrastructure investment has been achieved through baseline funding with the exception of Te Rito. This has resulted in reduced investment into other products and services, particularly EDK's analytical functions.

At the same time, the value of (and demand for) trusted and reliable data and analytics has grown significantly. For example, as recently as mid 2020 Attendance data was reported once per year, based on a single collection in Term 2. We are now reporting on a weekly basis, and are being requested by key stakeholders (ie Ministers and Policy teams) to provide significantly more granular levels of information.

9(2)(g)(i)

If the vision of Te Mahau is to be realised in relation to data and analytics, capacity, and capability within EDK will need to be considered. A lift and shift of EDK, will not achieve the desired benefits. Nor will other groups within the Ministry duplicating functions, eg setting up shadow data units, Education Workforce for instance.

Alongside this are significant challenges related to recruiting a range of essential technical specialists to key roles, in the current market. 9(2)(a)

This impacts EDK's ability to continue to service the range of priorities (and in recent times has contributed to budget underspends and project delays). There are also challenges associated with the growth of infrastructure, and this requires determination about next steps, and the appetite for risk and investment.

Nonetheless, EDK is well positioned to support the pipeline of education data and information services. International evidence suggests that when data maturity is relatively low, a centralised data and knowledge function is important. EDK provides an integrated and collaborative model, where business analysts and data scientists can work directly with staff involved in the collection and warehousing of data. That interplay supports better solutions and the ability of skilled staff to move between roles for career progression and assist in covering absences.

The profile and perceived value of data and information is not always recognised (or only recognised by exception when key information isn't available). It is difficult to recruit staff with the right skills. It's also proving difficult to shift the balance of staff demographics, particularly in terms of Māori and Pacific analysts.

With this, and the fact that we don't have access to informed local insight and contacts, in mind, we see real potential in our role within Te Pae Aronui, to bring data products and services closer to the frontline and our regions. We look forward to engaging with and supporting regional leaders and their teams in Te Mahau, and see potential for supporting, upskilling and potentially helping to resource data and analytical needs in regional teams, finding new ways to grow our understanding of the information needs they have.

This may mean supporting bespoke data units within the regional entities, and also within Iwi. We recognise that education data skills and product development is not restricted to the Ministry's national office. We have opportunities to work directly with specific communities to support local initiatives, as we have started in our early work with Ngā Puhī.

Historically, 'data shops' have tended to be viewed as back room, virtually invisible functions. To realise the positive outcomes that are anticipated from Future Education, visibility, direct connection to the frontline, and increasing integration and collaboration will be critical. That's the opportunity and challenge for evidence, data and knowledge capability within Te Pae Aronui.

EDK's vision, purpose and strategic priorities

The group's **vision** statement is that *EDK delivers high quality evidence to inform policy and practice*. To deliver on that vision, the group's **purpose** is to *collect, analyse and facilitate the use of evidence to inform investment and ensure the performance of the education system*.

EDK has five strategic priorities:

1. Producing insights for education and practice
2. Transforming our data assets
3. Transforming the way we disseminate knowledge
4. Developing our analytical capability
5. Increasing our cultural competence.

Our **mission** is to *make our data, information and products, accurate, timely, relevant, understandable, and impactful for priority learners/ākonga, parents/whānau, teachers/kaiako, academics, government, and, looking forward, Te Mahau as part of the Te Pae Aronui group, whilst always honoring our Te Tiriti o Waitangi obligations*.

EDK Groups and pipeline

EDK consists of three main groups each led by a Group Manager, along with a Director-led Office of the National Director. EDK provides a collaborative pipeline of data and information products and services – from collection, storage and refinement of data and information, through analysis, modelling, forecasting and insight development, to dissemination and publication, including through publicly accessible channels, data releases, publication of insights and informative papers, and development of bespoke data and information services. EDK's products and services support decision and policy-making, investment, evaluation of initiatives and interventions, and other actions taken at all levels of the education system and sector, to support wellbeing and attainment outcomes for ākonga.

The pipeline of data and information across EDK is shown in the diagram on page 9.

EDK Groups:

Data and Information Stewardship (DIS) - Wendy Hamilton, Chief Data Steward

Responsible for developing and executing policies, practices, procedures and technology (including with ICT and other colleagues to help with technical solutions) to manage the data and information lifecycle and deliver on the needs of data and information users. The group champions the safe and appropriate use of data and information for better decision making, leads the strategic and operational direction in data collection and use, and keeps data and information – and the ākonga and whānau who own that information – safe and protected. It drives increased automation and time savings in data collection, storage, and safe, secure storage and access to data sets (for example through the Education Data Warehouse), and supports urgent priorities such as the Covid-19 distance learning data collection.

DIS gives you:

- Useable, high quality, reliable data and information about education, enabling our stakeholders to add their value through informed decisions, insights, interventions and service delivery (ie we do the heavy data lifting)
- Trusted collaboration with Education partners and other agencies to change and save lives through the safe sharing of information
- Assurance that the rights and interests of individuals and communities are asserted, respected and protected in relation to data sovereignty and ownership
- Confidence that sector and ākonga data is valued as taonga, ensuring appropriate safety and privacy settings to maintain high trust in the Ministry's stewardship and use of data
- Safe and increasingly automated ways to provide, collect, combine and access data and information. This saves time and increases accuracy and quality of data that can be used ākonga, whānau, iwi, hāpu, communities, agencies and government to improve wellbeing and learning outcomes.

Teams are:

- Data (Manager: Katrina Young)
- Data Solutions and Warehousing (DSW) (Manager: 9(2)(a))
- Information Management (IM) (Manager: Selena Smeaton)
- Te Rito (TR) (Programme Manager: Mark Brumby)

DIS leads data collections and advisory services that support key Ministry priorities including attendance, school funding, principal salaries, targeted funding to support students most at risk of failing, ECE policies and operations, achievement, attainment and enrolment, workforce tracking information, data matching and working with other agencies to enable life-changing intervention and support to young New Zealanders. It also ensures that our data and information management practices are safe, and earn and maintain trust and confidence. This includes supporting and advising sector users about the safe collection and use of ākonga information.

The Chief Data Steward is also the Business Manager for Te Rito, a programme that will enable data and information about ākonga to travel with them as they move through the education system, strengthening the continuity of learning by ensuring critical information is available whenever it's needed, by those authorised to have it. In doing so, Te Rito is supporting ākonga, educators and the sector, whilst also reducing the burden associated with re-testing and other duplicative administrative processes, and keeping information safe. A separate briefing will be provided to the Deputy Secretary about Te Rito.

Analysis, Research and Evaluation (ARE) - David Jagger, Group Manager 9(2)(a))

A team of evaluators, data scientists, researchers, forecasters, modellers, survey and measurement specialists and analytical project administrators, ARE lead the integration of research findings, analytical foresight and evaluative thinking into policy development and operational programmes, and are increasingly seeking to deliver this support and knowledge directly to those interacting with learners on a daily basis. ARE aims to provide robust evidence to strengthen the knowledge base around educational outcomes and system performance, to drive better policy and practice.

ARE teams provide information and insights about the overall performance and international standing of the schooling system. It provides an improved understanding of whether initiatives, interventions and policy are working, and how much investment is required to maintain current settings or make shifts.

The group is further developing its measurement capability to support and improve our understanding of student wellbeing, and the baseline capability of learners at school entry.

ARE gives you:

- High quality foresight for planning purposes, through the forecasting of educational expenditure and key demand drivers and policy costing – ensuring the education sector is appropriately funded
- Quantified assessment of impact and effectiveness of educational programmes and initiatives – “what works, for whom, under what circumstances”
- Analytics and insights to support strategy and policy
- An evaluation capability programme to increase the sector’s use of data and evidence
- New tools and measurements to directly support students, the sector, and the system
- Managed end-to-end processes for externally procured research and evaluations, and runs in-house several large-scale international studies
- Thought leadership to the broader research and analysis sector.

Teams and Chief Analysts are:

- Forecasting and Modelling (FaM) (Manager: Isaac Malpass 9(2)(a))
- Educational Measurement and Assessment (EMA) (Manager: Barclay Anstiss)
- Analytics and Insights (A&I) (Manager: Simon Williamson)
- Student Wellbeing Measures project (Project Lead: Robyn McLeary-Hooper 9(2)(a))
- Two Chief Analysts: Cheryl Remington & one vacancy

Evidence Synthesis and Dissemination (ESD) - Cathryn Ashley-Jones, Group Manager

ESD is responsible for relaying the stories of the education system - both for students and those who support them. This can range from reporting students’ educational achievement and wellbeing, to forecasting demand for teachers in the short and mid-term. ESD reports across early learning, schooling and students’ transitions to tertiary education and training.

The group ensures that education stakeholders can understand the trends and changes in the education system and have ready access to timely data, useful interpretation, and insights for their decisions and actions.

It provides regular updates on new data trends and drivers, generates insights from the data, models current and future needs of the education system, demonstrates ‘what works and for whom’, provides a rapid response service for data requests, and manages the data and knowledge dissemination channels for customers (eg the Education Counts website, the Library and the Q-Drive for regional staff). ESD is the gateway to data and knowledge for customers.

ESD gives you:

- Regular reporting and publication of a comprehensive range of education and wellbeing data, and a range of data, information and education resources, including the Ministry's Library service
- Channel ownership and development for the dissemination of education data and information, insights and analysis and other publications and resources
- A programme of work supporting the understanding of workforce supply and demand, including the EWIS project which is transforming complex workforce data into an accessible and standardised database
- An information requests service providing responsive data and information services for the Ministry and increasingly the frontline
- Best Evidence Synthesis programme providing insights into practices that are valuable for teachers and educational professionals
- Reporting of nation-wide trends and changes in early learning, school attendance and attainment, and student's transitions to tertiary education. These provide key insights for the Ministry and Ministers and monitor a number of plans and strategies to understand education system performance and how education is changing.

Teams are:

- Customer Strategy and Channel Management (Manager: Dean Alexander)
- Information Requests (Manager: Dean Alexander – Acting)
- Evidence Synthesis & Reporting (Manager: Debra Taylor)
- Workforce & Strategic Analysis (Manager: Rebecca Burson)
- Chief Advisor Evidence Synthesis: (Dr Adrienne Alton-Lee)

Office of the National Director - Director: Sam Jolly (9(2)(a) [REDACTED])

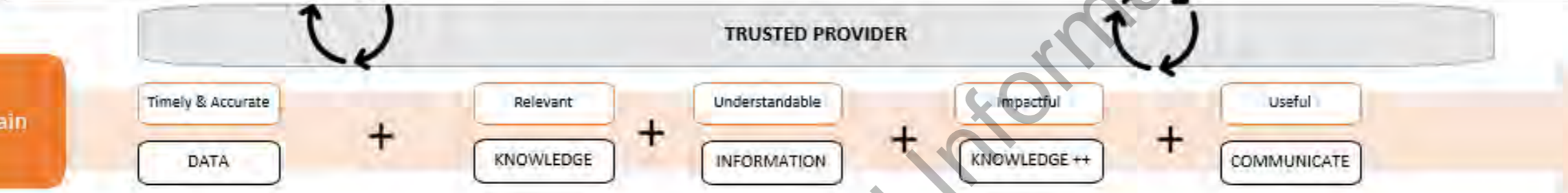
Provides operational and business support and strategic and policy advice to the Deputy Secretary, including EDK's relationship with Ministers' offices, coordination of commissioning and Ministerial responses, finance, procurement, human resources, risk management, planning, reporting, administrative support, EDK culture and communications, and internal ministry liaison.

In addition to six direct reports, two other positions within the Office are supported by the Director, and are direct reports of the National Director:

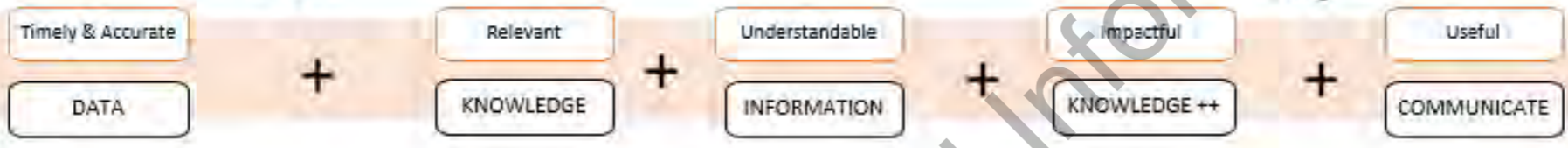
- Chief Education Scientific Advisor (Prof. Stuart McNaughton)
This role is 0.6 FTE and the incumbent is seconded from the University of Auckland
- Chief Advisor Priority Learners
Provides intellectual and strategic leadership of the story of achievement and performance to Ministry and other agencies and decision makers, with a particular focus on Māori and priority learners. Takes a lead role in working in partnership with key stakeholders and customers (eg iwi) to strengthen the knowledge base about lifting Māori and priority learner achievement and to ensure increased use of data and knowledge for decision making. Leads connection across Ministry and other agencies advising on issues and informing decisions about collecting, using, analysing Māori data.

Te Pae Aronui EDK Value Chain

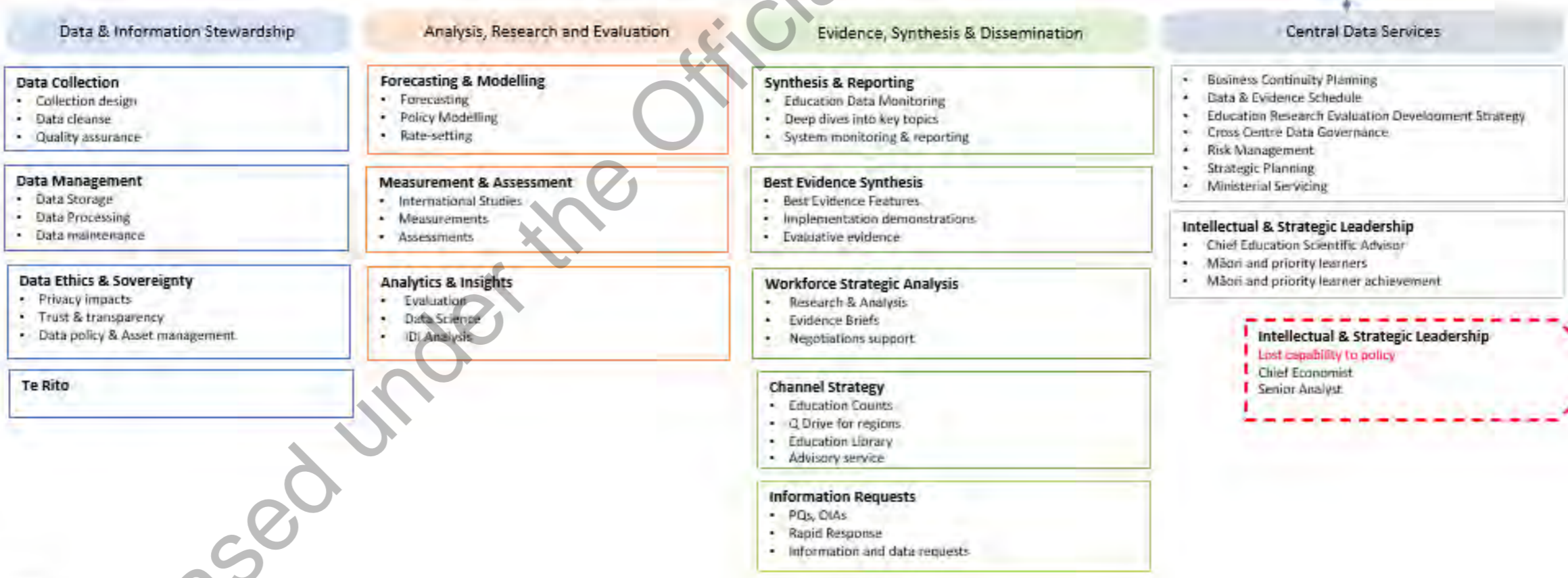
EDK makes information relevant, understandable and useful for parents/whānau, teachers/kaiako, learners/ākonga, academics and government.



Value Chain



Te Pae Aronui _ Office National Director



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Key information for incoming Deputy Secretary

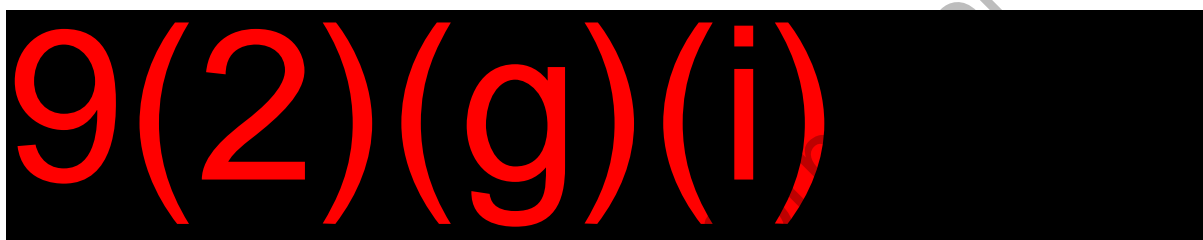
Immediate decisions needed:

- Resourcing and recruitment

Resources are oversubscribed and decisions needed on highest priorities so we can advise what can be done within current resourcing and on options for high priority work that falls outside current resourcing. Recruitment is challenging - market for skilled staff is competitive and we need decisions about where the delegations for approving recruitment sit and an efficient, timely process for approvals is very important.

- Budget issues

Managing within our budgets is difficult in the current settings, and is common across the Group.



- Advice and support to sector – Privacy

For future consideration in relation to Te Pae Aronui. There is a gap in service provision of privacy advice and support to the sector, particularly schools. Te Rito deployment has demonstrated value and need for privacy training, and how to apply privacy settings to information. DIS has some expertise but is not resourced to extend this service broadly to regional offices and the sector where there is real need. Privacy function in Corporate is only 1.5 FTE and focuses (correctly in our opinion) on supporting the Ministry's privacy needs. Consideration should be given to formalising a function in Te Mahau that increases privacy support and advice to the sector. DIS could be the home of this function but capacity would have to be increased.

- Pending approvals / signouts

2021 Teacher Demand and Supply Planning Tool update will be ready for sign-out at the end of October. This is a key input into workforce decisions and is keenly sought by the Workforce supply group and the Minister.

NELP TES monitoring indicators Education Report and infographic is due at ELT in late September and will need to be submitted to the Minister in October.

Priorities and deliverables in the first 60 days

Note that detailed work plans and descriptions for each group within EDK are available.

- 9(2)(f)(iv)
- Reliable and consistent attendance reporting at more granular levels than previously possible, particularly to support:
 - Post-Covid attendance – greater understanding of weekly attendance profiles in various areas/regions sliced by various demographics and attendance codes
 - Responding to select committee for attendance – again, will require increased levels of granularity than currently provided
- Commence scoping and planning how the Equity Index will be integrated into our data 9(2)(f)(iv)
- Update on Student Wellbeing Measures project – Briefing Note / Ed Report (Minister Tinetti cc Minister Hipkins)
- Letters going out to over 650 schools in October/November to invite them to participate in large-scale assessments during 2022. These include schools participating in NMSSA, PISA and TIMSS
- Finalising National Student Roll Projections – potential for a Briefing Note subject to decisions at the upcoming the ELT session
- Supporting the formal OBU Education Report from Finance to Treasury
- A joint ELT paper (with Te Uepu Reo Māori, ELSA) outlining rationale for developing an assessment for Māori-medium settings
- 2021 Teacher Demand and Supply Planning Tool update (as above). Results are used by Te Puna Ohumahi Mātauranga as one input into their decisions on workforce policy, and sector is very interested in the results
- NELP TES monitoring indicators (as above). Due to be submitted to the Minister in **October**
- Attendance reporting at present comprises our weekly COVID-19 reporting (which is on-going) and reporting of regular attendance by term. Term 3 regular attendance report will be available late **October**
- 2022 Data Release Schedule due to Ministers late **November**. This is a routine forward looking annual update which provides the Ministers and their offices the schedule of data releases for the year ahead
- 2021 ECE census update scheduled for release in **December** 2021. It provides key information on early learning that is not available in any other data collections
- Māori education – Māori-medium teacher count and teacher subjects. Iwi profiles which are a tool for iwi to access timely data on their members are in the process of redevelopment. Priority to get this back on track and deliver
- Best evidence synthesis evaluations (timing yet to be decided):
 - The independent evaluation of Taonga Mō Ngā Tamariki is to be released - a joint initiative between the Ministry and Corrections, is a whānau reading and literacy intervention based on an adaptation of the Early Reading Together® and Reading Together® Te Pānui Ngātahi programmes. It is delivered to parents and caregivers in the care of Corrections
 - A summary of evaluations and implementation exemplars of Reading Together® Te Pānui Ngātahi
 - Oversight of the evaluation of the expansion of Reading Together® Te Pānui Ngātahi being funded by PICI.

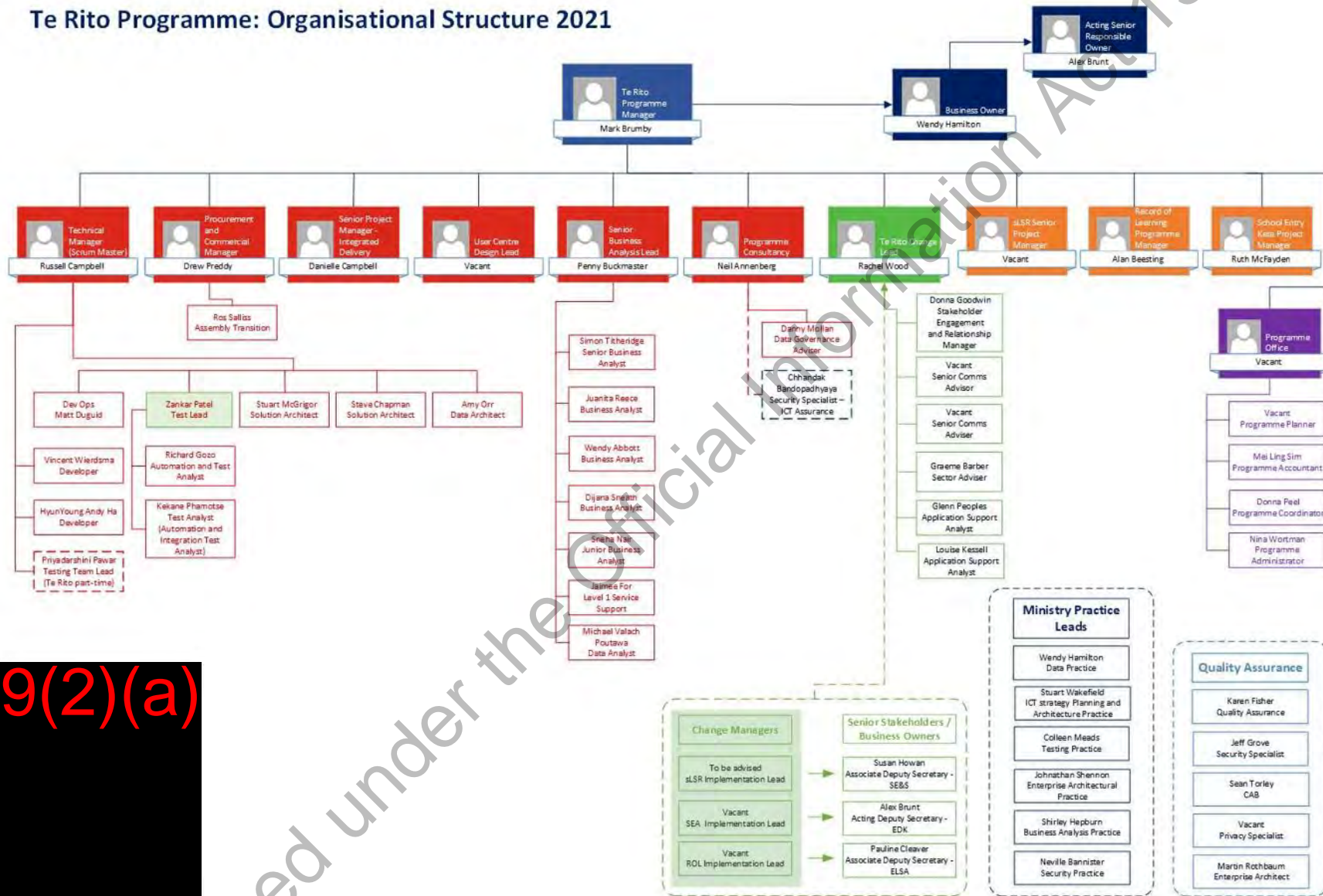
Key risks and issues

- EDK resourcing and recruiting
 - High staff turnover and prevailing market shortage of skillsets in competitive recruitment market – results in lack of skilled staff in key roles and potential delays in delivery, loss of Intellectual Property, and work continuing without necessary oversight
 - Demand for some products and services is reactive by need, whilst work programmes take a long term focus. Matching demand with available resources requires prioritisation and a strategic approach noting not all demand can be met with available talent

○ 9(2)(g)(i)

- 9(2)(g)(i)
- Proliferation of siloed datasets
If the take up and use of integrated and well-curated datasets from agreed sources including the EDW is low, siloed datasets risk different answers to same questions from different data
- Teacher and sector workforce shortage
Likely to escalate as borders open and there is movement of teachers. This will put pressure on our small, highly skilled workforce analysis team in ESD
- Attendance reporting and analysis
There is a significant focus on attendance, including a select committee. Whilst an opportunity to support front line services with timely data and responsive insights, also a risk if we are not resourced to front foot opportunities
- Through resetting of our role in Te Pae Aronui, there is a risk that FaM could become increasingly involved in basic operational modelling and rate-setting activities, at the expense of more technical forecasting and policy modelling capabilities and ability to stay tuned into knowledge of policy developments. We have worked hard to build a team of expert forecasters and modellers equipped to drive forward a forecast improvement programme to continually increase the accuracy and quality of Ministry demand and expenditure forecasts. We want to guard against changes of focus which reduce our capacity to deliver these developments and bring risks to staff morale and retention
- We have noted increased difficulties in meeting the high response rates required to meet the international quality standards for our large-scale assessment studies. Covid-19 could potentially impact this further with schools reluctant to commit time or permit access, as well as increased student absenteeism. We are working with the sector engagement team to identify the best channels for engaging with schools so they are aware well in advance of their requested participation and we are able to provide support to schools where necessary

Te Rito Programme: Organisational Structure 2021



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29 September 2021

Appendix 3: EDK Work Programme Report

Sep-21		OK	Watch	Alert					
EDK Work Programme - key projects report									
Programme	Project	Lead	GM	Overall	Delivery	Risk	Status commentary	Action	
Infrastructure	Equity Index Implementation		David						
Infrastructure	ECE Moving to Pay Parity	Sam Jolly	David Jagger				Current purpose of the project group is to identify who needs to be involved in planning to commence the implementation of the Equity Index, including allocation of new departmental funding available to EDK.		
Infrastructure	Supporting Pacific Bilingual		Wendy				TBC		
Infrastructure	Data Modernisation	Delia	Wendy						
Infrastructure	Te Rito	Mark B	Wendy				9(2)(f)(iv)		
Infrastructure	Distance Learning	Katrina Young	Wendy					<p>Proactive internet connections EDA have received approval to expand the rollout of proactive internet connections to the rest of the country as the demand in Auckland has been lower than anticipated.</p> <p>Historical distance learning data The business requirements for storing the 2020 distance learning data are being finalised which will inform the design, ingestion and reporting from the enterprise data warehouse.</p> <p>Distance Learning readiness and response plan The ELSA PMO has been stood up again (after disbanding at the end of June) to focus on our preparedness and the preparedness of the sector</p>	
Work Force	Workforce 2021 Programme	Rebecca Burson	Cathryn				Progressing well although at a slower pace as the new team is formed. Some key person dependencies to actively manage. The forward programme was presented to Ew/ADOG. It shows that for the next 12 months pay equity and negotiations work will take precedent. In addition the work on the TDS update has started; this is due to be released in October	Continue to monitor progress and dependencies. Prioritise recruitment. Socialising work programme as a way of managing expectations.	
Work Force	EWS	Lee Bremmer	Cathryn				The IQA review has been completed and when a new project manager starts we will address the recommendations. The risk for this programme looking ahead is that we have key person dependencies in the workforce team and they may not have time to assist with this work.		
Work Force	2021 Teacher Demand & Supply	Adam Swanson	Cathryn				Resourcing for this work is light and timetables for delivery are to be confirmed. Key data dependency risks that are being actively managed.		
Work Force	Pay Equity Calculations	Ken Maher	Cathryn				initial fiscal model for Administrator and Kaiarahi pay equity claims, and TAPEC October payment calculations are on track to be delivered within deadline. Solid collaboration across ELSA, SE&S and EDK.		
Work Force	Teach First NZ Evaluation	Matilde Figuracion	Cathryn				Phase 2 of the evaluation is running smoothly. First Advisory Group meeting was held on 21 July where the initial findings from the secondary data analysis was presented by Standard of Proof.	Next thing to do is to collect primary data by developing an online questionnaire survey for school leaders of host schools. This phase is expected to be completed by October	
LSAP	LSC Evaluation	Mira Peter	David				Phase 2 draft report was submitted by Synergia 10 August. Planning for A3 to accompany it was completed 9 August. Planning session for Phase 3 was completed 10 August. Draft report on the results of the the feasibility of propensity score matching for measuring the impact of learning support co-ordinator (LSC) roles on outcomes available in the Ministry secondary data sources is due 13 August.		
LSAP	School Entry Kete	Sonia Glogoski	David				Excellent progress with procurement. We now have contracts for Oracy and communication, Literacy, Maths tools, negotiating Emotional tools and evaluating bids from identity maps procurement. Still some risk around Ministry communication of SEK and Minister briefing. All individual tool components development by contracted providers underway. Overall kete development subject to approval by Minister Tinetti. Briefing note to demonstrate need and alignment to curriculum workstreams and strategies underway. Likely sent over with ELSA's Literacy and Mathematics strategy papers end of September.		
Analytics for insight	Student Trajectory (ID)	Claudia Recker	David				9(2)(f)(iv)		
Priority Evaluations	Pacific Support Funds	Claudia Recker	David				Malatest's Evaluation Workplan agreed; fieldwork about to commence; interim report due in October. Malatest present culturally responsive research methodology to R Jamieson, T Chrisp & A. Schollmann on 11/08.		
Priority Evaluations	URF Evaluation	Claudia Recker	David				Chris Casey completed analysis of attendance data, which was included in the August report to the Minister. Survey with funding recipients in field and done by SE&S. Provided feedback on survey questions but got no response.	No to do for A&I.	
Priority Evaluations	Food in Schools Evaluation	Claudia Recker	David				Pilot report completed and Minister has been brief. Procurement for evaluation of Phase 2 (the roll-out) has been completed and contract awarded to Standard of Proof who also evaluated the pilot. Project kick off meeting on 16 August.		
Large Studies	TALIS (contracted statements)	Barclay	David				We readvertised for Senior Analyst and have had 6 applications. Interviews will take place in the next 2 weeks		
Large Studies	PIRLS	Barclay	David				In a lull in the cycle.		
Large Studies	TIMSS	Barclay	David						
Large Studies	NMSSA	Barclay	David				We are transitioning to Sarah leading NMSSA. Progressing development of new contract for 2022 onwards. Paper with Alex		
Large Studies	PISA	Barclay	David				Field Trial data has been submitted on time to the OECD. On track to draw sample for Main study. Drafting letters to send to selected schools		
Wellbeing	Student Wellbeing Measurement	Robyn McLeary-Hooper	David				Two hour Co-design Facilitator's Kit almost complete. No workshops signed up but a number in the pipeline. Five facilitators identified and will need further training. MoE now part of DPMC led coordination of wellbeing work across government.		
ESD	Attendance & Attainment	Katherine Hayes	Cathryn Ashley Jones				We are involved in the provision of advice to the Māori Affairs Select committee – feeding into the ESP process. ERD are consulting with the AA group on their attendance survey of whanau which has the potential to give us some information on the drivers of non-attendance.		
ESD	Māori Data Environment	Katherine Hayes	Cathryn Ashley Jones				We presented the overview of EDK work to the Māori education teams. They gave us some feedback and were delighted with this infographic. They said that they felt 'backed' by EDK and it was great to see this overview. We had an excellent discussion and Megan forwarded the Cabinet paper on Māori medium and looked forward to engagement on that.		

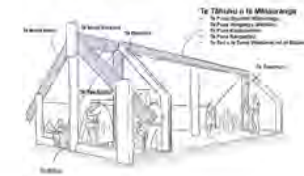
Chief Advisors	Project or Key activity	Lead	SRO	Overall	Delivery	Risk	Status commentary	Action
Mark	Education Research, Evaluation Development Strategy	Mark	Alex				Lisa's arrival has provided much needed Project Management skills and knowledge. The Terms of Reference was agreed by the Steering Group at their first meeting on 28 July. A Risk Workshop was held highlighting all the main risks and presented to the Steering Group. A Working Group has been assembled from representatives from all 3 participating organisations, the first meeting the week of 16 August. Stuart is writing a	
	Briefing to New Dep Sec	Rob	Alex				Initial draft has gone to GIMs for review. [redacted] is setting up meetings with GIMs for next week to discuss their input to the briefing	
	Education Data Governance Committee		Alex				The invitation letter to CEs and DCEs to an expanded EData GC and its accompanying Terms of Reference are with Alex for review and sign-off. Aiming for a 26 August meeting so letters need to go out ASAP	
	EDK Governance Strategy		Alex				This work has been overtaken by the work [redacted] is doing on Boards. I discussed with her and she agrees her work has overtaken this.	
Andrew	Disability analysis	Andrew	Alex				9(2)(g)(i)	
	Misori medium	Ariarne/Andrew	Alex				Two projects are currently being scoped: one policy work relating to increasing MME provision (Andrew lead); and one relating to the definition of MME (Ariarne lead). The former is likely to involve IDI work, which has already started. Progress going well here and a lot of engagement from MME-relevant parts of the Ministry, but they have not fully formed their data needs.	
	Achievement and progress - E-asTTle, PaCT, NCEA	Mercy	Andrew				This involves working with ELSA to a) support implementation of the NCEA changes; b) respond to miscellaneous queries about e-asTTle/PaCT; and c) collaborate with NZCER on integrating PAT and e-asTTle insights. Have so far met all milestones, but volumes of WPQ/OIAs relating to e-asTTle and PaCT continue to increase.	
	Attendance	Andrew	Alex				Involves supporting the select committee inquiry on attendance; working with ERO on research relating to attendance; and supporting schools in responsive reporting. Progress in all three is going well, and we are well-positioned to support an initial brief to the select committee inquiry. Future data needs of the inquiry are currently unknown, however, and have the potential to quickly ramp up. This will likely require resources	

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Evidence Data & Knowledge

OUR CONTRIBUTION TO TE PAE ARONUI

Strategic Plan 2021 - 2022



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OUR STRATEGIC PLAN EXPLAINED

- In preparing our plan, we recognise that the establishment of Te Pae Aronui is under way and will work with the new Dep Secretary and Leadership Team to align to the new priorities and ways of working, as required.
- At this time, our plan has been prepared to deliver a work programme in response to the Ministry's current Strategic Objectives. In addition, we capture the core business functions and services that we deliver to customers. *Refer to the Business Model & Value Creation*
- Our plan includes a summary of the challenges and opportunities presenting in the new operating environment and responds with a series of tactical projects, and a focus on outcomes to lift performance across our operating model.
- Our work programme and core business functions provide strong coverage of the Strategic Objectives. *Refer to the Strategic Coverage.* We are also planning some flex within the delivery model to ensure we can accommodate changes required as part of Te Pae Aronui.
- The plan for 2021/22 is ambitious and has risk. Major risks include managing our people through the establishment Te Pae Aronui and retaining key skills in a difficult market, 9(2)(g)(i)
- Over the next year we will pay particular attention to activities to lift performance across the operating model. We commenced this thinking in advance of the Te Pae Aronui details being announced and acknowledge adjustments will be required.
- Our management framework includes a Strategy Map and a Balanced Scorecard to manage the delivery of the plan. *Refer to the Performance Objectives.*
- A key focus is on ensuring our people transition well into Te Pae Aronui and services continue without disruption to our customers.

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Alex Brunt
EDK, Acting Deputy Secretary

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OUR STRATEGIC PLAN - OUR CONTRIBUTION TO TE PAE ARONUI

- Transitioning to TE PAE ARONUI
- Strategic Context
- Mission
- Culture
- Kaupapa
- Operating Environment – Summary of challenges and opportunities
- Work Objectives
- Internal Performance Objectives
- Current Business Model
- Value Model
- Key Priorities – work programme
- Strategic Coverage
- Key Performance Indicators
- Performance Framework
- Our Budget

STRATEGY DISABLERS

STRATEGY ENABLERS

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TRANSITIONING TO TE PAE ARONU

Introducing Te Mahau within Te Tāhuhu o te Mātauranga | The Ministry of Education

Te Tāhuhu o te Mātauranga is one organisation with a new design that is intended to provide greater support to the education sector and others so they can deliver inclusive education that meets the needs of ākonga | students and whānau | families. This provides us with real opportunities to make a much bigger difference to education and to work closer with those we are here to serve.

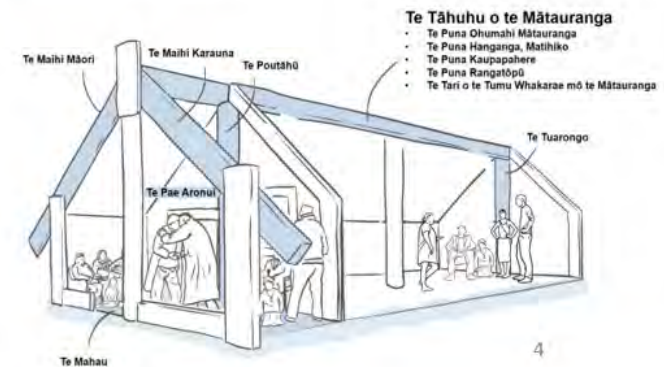
Te Mahau is intended to be a demanding customer of the enabling groups in Te Tāhuhu and will be a key driver of these groups' work programmes.

This positive tension is deliberate, as is the overarching priority to work with and across the organisation and sector.

The design for Te Tāhuhu is intended to support us to:

- Take practical action to give effect to te Tiriti o Waitangi
- Give priority to regional and local voice
- Deliver greater responsiveness, accessibility and integrated services and support
- Improve feedback loops and information flows

Aside is an overview of Te Mahau within Te Tāhuhu o te Mātauranga and who does what .



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STRATEGIC CONTEXT - PROVIDED BY CORPORATE STRATEGY & PERFORMANCE

Strategic Context for Business Planning 2021/22

Vision and purpose

THE EDUCATION SYSTEM IS A MAJOR CONTRIBUTOR TO:	Social and cultural participation and wellbeing Economic prosperity and growth
Vision for the future of education	Whakamaua te pae taha kia taha – take hold of your potential so it becomes your reality. We are descendants of explorers, discoverers and innovators who used their knowledge to traverse distant horizons. Our learning will be inclusive, equitable and connected so we progress and achieve advances for our people and their future journeys and encounters. Whāia te pae tawhiti kia tata – Explore beyond the distant horizon and draw it near.
MINISTRY OF EDUCATION – OUR PURPOSE:	We shape an education system that delivers equitable and excellent outcomes.
Our commitment to the Treaty of Waitangi:	We honour the obligations of partnership, participation and protection.

Outcomes/objective we are seeking to achieve:



Building Ministry capability for success: (Satoro) Change Principles, ESA Consultation Document		6
Te Tiriti	Give practical effect to the articles of Te Tiriti o Waitangi by making them relevant and present in all we do.	
Learner and whānau centric	Grow and develop our own capability to reflect the strengths and diversity of all learners and their whānau.	
Partnerships	Establish authentic and transparent relationships with our partners that enable local decision making and ownership.	
Evidence based	Proactively develop inclusive and sustainable solutions and services that are driven by evidence to anticipate and influence change.	
Service-oriented	Capacity and capability are organised for collaboration and integration, with service delivery designed from the perspective of end users.	
With:		
Strong leadership and clear strategic direction	Capable and engaged staff	
Good financial and resource management	Good information management systems and processes	

Tā te Tāhuhu whāinga | The Ministry's purpose

We shape an education system that delivers equitable and excellent outcomes. We fulfil this purpose through two distinct roles:

1. Our shaping role is where we work on the policy, settings and performance of the education system so that it is well placed to deliver outcomes for ākonga and their whānau, from early learning through schooling and tertiary education.
2. Our operational role, delivering services and support nationally, regionally and locally. This includes our regulatory role and some important services that we provide directly to ākonga and whānau, such as specialist learning support, although most of our services are delivered through the education sector workforce and others that work with them.

The strength of our system depends on us working closely with our national partners (the Tertiary Education Commission [TEC], the New Zealand Qualifications Authority [NZQA], Education New Zealand, the Teaching Council and the Education Review Office [ERO]), other government and education agencies, and with the sector (early learning, compulsory and tertiary). It also depends on our relationships we all have with others in the community including iwi, employers and non-government organisations.

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THE MINISTRY'S VISION - PROVIDED BY CORPORATE STRATEGY & PERFORMANCE

THE EDUCATION SYSTEM IS A MAJOR CONTRIBUTOR TO:

Social and cultural participation and wellbeing

Economic prosperity and growth

Vision for the future of education

Whakamaua te pae tata kia tina – take hold of your potential so it becomes your reality. We are descendants of explorers, discoverers and innovators who used their knowledge to traverse distant horizons. Our learning will be inclusive, equitable and connected so we progress and achieve advances for our people and their future journeys and encounters.
Whaia te pae tawhiti kia tata – Explore beyond the distant horizon and draw it near.

MINISTRY OF EDUCATION – OUR PURPOSE:

We shape an education system that delivers equitable and excellent outcomes

Our commitment to the Treaty of Waitangi:

We honour the obligations of partnership, participation and protection

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OUR MISSION

Our mission is to make our data, information and products, accurate, timely, relevant, understandable and **impactful**

for priority **learners /ākonga**, parents/whānau, teachers/kaiako, academics, government, Te Mahau and the Ministry;

whilst always honouring our Te Tiriti o Waitangi obligations.

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OUR CULTURE

The Whānau Culture: We aspire to a culture based on collaboration. Staff share commonalities and see themselves as part of one big family who are active and involved.

Leadership takes the form of mentorship, and the organisation is bound by commitments and traditions. The main values are rooted in teamwork, nurturing, communication and consensus.

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OUR KAUPAPA

The following are the key components of our Kaupapa

HE HUARAHI PAI MINISTRY BEHAVIOURS	MEANING	MEANING
<ul style="list-style-type: none"> Pono 	<ul style="list-style-type: none"> We do the right thing - not the easy thing 	<ul style="list-style-type: none"> Being on time Being prepared Being accountable Being reliable
<ul style="list-style-type: none"> Aroha 	<ul style="list-style-type: none"> Care and concern for others 	<ul style="list-style-type: none"> Being completely honest
<ul style="list-style-type: none"> Ōrite 	<ul style="list-style-type: none"> Equitable opportunities for all 	<ul style="list-style-type: none"> Recognising and supporting diversity
<ul style="list-style-type: none"> Whanaungatanga 	<ul style="list-style-type: none"> A shared purpose and sense of belonging 	<ul style="list-style-type: none"> Delivering quality Making a difference
<ul style="list-style-type: none"> Kaitiakitanga 	<ul style="list-style-type: none"> Looking after our relationships and our resources 	<ul style="list-style-type: none"> Keeping promises
<ul style="list-style-type: none"> Manaaki 	<ul style="list-style-type: none"> We are kind, generous and respectful 	<ul style="list-style-type: none"> Respecting everyone
<ul style="list-style-type: none"> Mahi Tahī 	<ul style="list-style-type: none"> We connect and collaborate 	<ul style="list-style-type: none"> Know our customers
<ul style="list-style-type: none"> Whakamanawa 	<ul style="list-style-type: none"> We empower each other to do our best 	<ul style="list-style-type: none"> Delivery focused Being positive

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RANDOM NOTES

- Supporting the regions access to data bases,
- Analysts data access
- Advisors want products
- Standardisation
- Reboot governance of data management
- Small data groups within regional groups
- Redesign for product
- Rebranding
- Transition products into EDW
- Reduce the cost of producing products
- Relationships with other agencies

OUR OPERATING ENVIRONMENT — from our SWOT Analysis

The operating environment will provide many challenges but lots of opportunities

CHALLENGES	▶	OPPORTUNITIES
Delivering to te Tiriti obligations and responding appropriately		Lead the way – establishing a strategic project to concentrate effort.
Engaging effectively with Māori and delivering to their data needs		Front foot and get moving. Key priority projects underway.
Developing our cultural competency and applying to our business		Continue with strategic development and immediate application.
Finding our place in the new structure, what's our relationship		Plan early for the transition, to be well placed for October and beyond.
Other providers can do what we do?		Established position to build from, demonstrate our value
Data and evidence is not always valued and trusted		Continue to develop our value story and trust framework.
Data privacy, ethical breaches destroy our trustworthiness		Continue to develop our "Quality & Relevance" performance metrics
Managing the transition to the new operating model		Move quickly to understand and impact on these changes
Cross Agency Collaboration in a competitive market		Develop our comparative position and activity lead the collaboration
Effective communication of our value now and in the future		Develop our value proposition and communication strategy
Improving our internal performance – to support delivery		Concentrated focus on our internal performance & managing it

STRATEGY DISABLERS

STRATEGY ENABLERS

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OUR WORK OBJECTIVES

In response to the Ministry's Objectives and the Operating Environment, we will

- contribute to the establishment and implementation Te Pae Aronui by:
 - Taking practical action to give effect to te Tiriti o Waitangi.
 - Giving priority to regional and local voice.
 - Delivering greater responsiveness, accessibility and integrated services and support.
 - Improving feedback loops and information flows
- support the Ministry deliver to our Te Tiriti o Waitangi obligations
- provide the front-line with information and evidence to support the improved equity of outcomes and well being of our priority learners/ākonga, parents/whānau, teachers/kaiako,
- continue to deliver the Education Work Programme
- support curriculum leads delivering the curriculum achievement plan
- support the National Education and Learning Priorities, equity of learning outcomes for Māori and Pacific communities the Tertiary Education Strategy
- work with the Associate Minister Māori Education to support ākonga Māori, te ao Māori and Māori medium education.
- take responsibility for strengthening the quality of teaching and improving learner achievement based on educational measurement and assessment feedback contributing to evidence informed change.
- take responsibility for championing the use of evidence and evaluative practices to improve outcomes across the full gamut of child wellbeing.
- oversee work regarding the investment and development of data infrastructure (eg Te Rito) capability to improve data collection and analytics.
- oversee of the Ministry's commitment to progressing data sovereignty and governance accountability.

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OUR PERFORMANCE OBJECTIVES

QUADRANTS	PERFORMANCE OUTCOMES	ACTIONS
PEOPLE & TOOLS	<ul style="list-style-type: none"> To improve management of our people, ensuring our staff are positive, safe and well, working on the right things, and their development supports our strategic direction To ensure our management tools are fit for purpose and support our staff operate effectively To ensure our finance processes are 'fit for purpose' and enabling our business To ensure all staff are lifting our cultural competency To increase our IDI capability across EDK 	<ul style="list-style-type: none"> Develop people and tools quadrant (refer Scorecard development) Develop and implement capacity planning to provide flex and agility within the workforce, including work packages Review management tools required to do our jobs. Key focus of financial management Implement the strategy map and performance framework (underway) Implementing strategic development programme – see strategic lift projects & Tātai Pou framework Develop & Implement wellbeing and culture measures, supporting existing modules Develop and implement knowledge at risk plans, talent plans and succession plans Review current induction processes and ensure the strategic plan is covered Develop processes for cross group staff recruitment, rotation and secondment opportunities Develop and implement activity-based budgeting for all strategic projects (or all activity) – implement budget buddies to support (to build capability) Continue progressing through the Tātai Pou framework <ul style="list-style-type: none"> Pou Hono: Valuing Māori Pou Mana: Knowledge of Māori context Pou Kipa: Achieving equitable education outcomes for Māori
SERVICE DELIVERY & BUSINESS PROCESSES	<ul style="list-style-type: none"> To improve our planning and management processes so they are fit for purpose, and improve (eliminate) unnecessary processes that don't add value To ensure we are all aligned to our strategy and as a team we are going faster and higher To ensure business processes are optimised and supporting the business delivery To ensure evaluation and monitoring processes are embedded into our strategic investments. 	<ul style="list-style-type: none"> Implementation of a Project Management Office within ODS Implementation of project methodology for all strategic projects Evaluate the concept of 'Centralised Services' within ODS Implement structured commissioning of products with customers Review approval processes and procedures and workflow to support timely delivery of our products Formalise planning and budgeting cycle, aligned to the Ministry cycle Complete a stock take of business processes and determine pain points for resolution – a Tactical project Establish an 'evaluation and monitoring' working group to develop an implementation plan
CUSTOMER SATISFACTION	<ul style="list-style-type: none"> To improve customer satisfaction through active engagement with our customers To improve our service delivery, ensuring we deliver the rights things, on time, in a way that is understandable to our customers, delivering useful products that make an impact To be increasingly proactive in bringing forward insights and evidence to the business 	<ul style="list-style-type: none"> Review our channels and dissemination to ensure we are reaching our customers appropriately Review our self service options and support structures for our customers Implement co-design processes into our product development cycle Develop and implement an EDK Marketing Plan Develop and implement a Communication Plan Development and implement a stakeholder engagement plan Implement regular EDK activity updates at business group meetings (eg two groups a month) Implement EDK Front Door for customer inquiries – including response times Development and implement regular customer review sessions – close out and lessons learnt Develop customer satisfaction and quality measures, implement collection process
QUALITY & RELEVANCE	<ul style="list-style-type: none"> To improve the quality and accuracy of our data, information and products To ensure our data management principles are followed all the time To ensure our customers/stakeholders have trust and confidence in our products 	<ul style="list-style-type: none"> Imbed systems and processes to protect the use and management of private information Continue to develop the trust framework and imbed into our work practice Develop a customer commissioning process to include data stewardship in the sign out process Develop and implement quality and relevance measures within the framework, as developing with the Scorecard Working Group

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OUR CURRENT BUSINESS MODEL – HOW WE CURRENTLY DELIVER

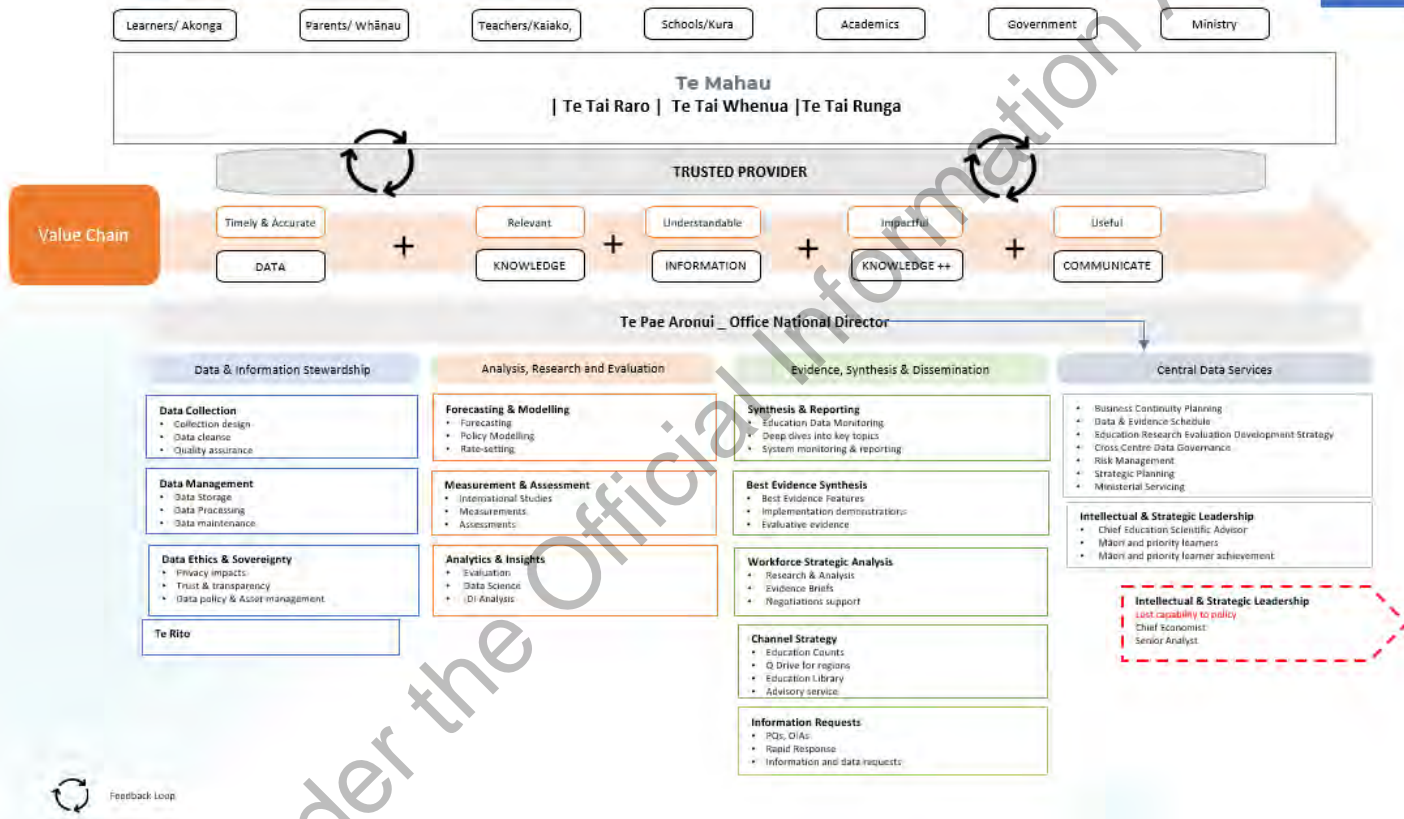
KEY PARTNERS	KEY ACTIVITIES	VALUE PROPOSITION	CUSTOMER RELATIONSHIPS	CUSTOMER SEGMENTS
<ul style="list-style-type: none"> • Māori Education Peak Bodies • Government Agencies • Universities • ERO • Careers NZ • Stats NZ • Treasury • NZCER • NZQA • TEC • EPL • NZEI • PPTA • STA • PSA • International Partners • SMS Vendors • Technology Partners • ICT 	<ul style="list-style-type: none"> • Data Collection • Data Management • Data Stewardship • Ethics advice • Bespoke Analysis • Research & Evaluation • Best Evidence Synthesis • Reporting • Dissemination • Information Requests • Communication • Publications 	<p>We provide data, information and products, that are</p> <ul style="list-style-type: none"> • accurate • timely • relevant • understandable • and impactful <p>To provide evidence base to</p> <ul style="list-style-type: none"> • inform improved educational outcomes for learners and their whanau, • inform improved educational outcomes for Māori learners, priority learners and their whanau, • inform educational practice and policy, and continued improvement., • release data to inform Government policy, meet legislative requirements e.g. OIAs, Education Act, Privacy Act and respond to questions, • monitor the Education system performance (NZ and PACIFIC) 	<ul style="list-style-type: none"> • Direct • Indirect 	<ul style="list-style-type: none"> • Learners /ākonga • Parents/Whānau • Teachers/kaiako, • Academics • Peak Bodies • Government Agencies • The Ministry
	<p>KEY RESOURCES</p> <ul style="list-style-type: none"> • Te Tiriti o Waitangi • Te Rito • Education Data Warehouse • EDK Library • Evaluation Hub 		<p>CHANNELS</p> <ul style="list-style-type: none"> • Education Counts • Information Requests • Education Library • Publications 	
			<p>BUDGET</p> <ul style="list-style-type: none"> • A210 : Personnel* \$ 21.281 M • A220 : Operating \$ 12.846 M TOTAL \$ 34.127 M <p>* includes 21 vacancies</p>	

PEOPLE – EMERGING CAPABILITY REQUIREMENTS

- Te Tiriti o Waitangi >> Learner and Whānau centric >> Partnerships >> Evidence Based >> Service-oriented >> Customer focused

Te Pae Aronui EDK Value Chain

EDK makes information relevant, understandable and useful for parents/whānau, teachers/kaiako, learners/ākonga, academics and government.



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OUR KEY PRIORITIES – WORK PROGRAMME

The following are our key priorities that will be monitored by the Leadership Team.

(W.O.L) – Whole of Life

KEY PRIORITIES	DESIRED OUTCOMES	BUDGET ** (W.O.L)	LEAD
Māori Data Environment	<ul style="list-style-type: none"> To support Māori education and the growth of te Reo. 	Baseline	Cathryn
Attendance and Attainment	<ul style="list-style-type: none"> To support learner needs through timely data and relevant analysis and evidence. 	Baseline	Cathryn
Te Tiriti o Waitangi	<ul style="list-style-type: none"> To act on our Te Tiriti o Waitangi data and evidence obligations. 	Baseline	Cyril
Te Rito Programme	<ul style="list-style-type: none"> To provide easily accessible, timely, trusted and safe information, to support learner wellbeing and achievement. 	\$ XXX M	Wendy
School Entry Kete	<ul style="list-style-type: none"> To ensure new entrant teachers are supported with an easy to use school entry tool. 	\$ 7.0 M	David
Education Workforce Information System	<ul style="list-style-type: none"> To improve access to information, improve the quality, security and breadth of workforce data. 	\$ 11.0 M	Cathryn
Student Wellbeing measurement	<ul style="list-style-type: none"> To design and implement Student wellbeing measures to increase understanding of wellbeing at school. 	\$ 0.75 M	David
Education Work Programme	<ul style="list-style-type: none"> To support the delivery of the work programme by providing trusted, accessible information and insights to inform policy and practice. 	Baseline	ALL
Education Workforce Strategic Analysis	<ul style="list-style-type: none"> To provide evidence and insight to support objectives of the NELP, TES and Work programme and pay negotiations. 	Baseline	Cathryn
Education Work Programme Evaluation	<ul style="list-style-type: none"> To understand the value realised of the Education Work Programme (3 year evaluation programme) – wellbeing & equity 	Baseline	David
Addressing Learners Needs	<ul style="list-style-type: none"> To address Learners' needs by improving data quality, availability, timeliness and applied insight. 	\$ 1.8 M	David
Implement the equity index infrastructure	<ul style="list-style-type: none"> To support the ongoing development and implementation of the Equity Index in schools. 	\$ 2.9 M	Wendy/David
ECE - Moving Towards Pay Parity	<ul style="list-style-type: none"> To provide accurate and timely analysis for each stage of a pay parity claim process. 	\$ 1.7 M	David
Supporting Pacific bilingual	<ul style="list-style-type: none"> To support Pacific bilingual and immersion education in schooling. 	\$ 0.2 M	David
Future Education – Change Programme	<ul style="list-style-type: none"> To proactively support the Future Education Programme, in particular supporting the frontline with data and evidence. 	Baseline	Alex
Research & Evaluation Development	<ul style="list-style-type: none"> To develop a Research & Evaluation framework that meets the needs of the sector 	Baseline	Cathryn

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OUR KEY PRIORITIES – STRATEGIC COVERAGE

KEY PRIORITIES	1. Learners at the Centre	2. Barrier-free access	3. Quality Teaching and Leadership	4. Future of Learning and Work	5. World Class inclusive Public Education	Status	
Te Tiriti o Waitangi	✓	✓	✓		✓		
Te Rito Programme	✓	✓	✓	✓	✓	Underway	
School Entry Kete	✓	✓	✓	✓	✓	Underway	
Education Workforce Information System	✓	✓				Underway	
Student Wellbeing measurement	✓	✓				Underway	
Education Work Programme (NELP & TES)	✓	✓		✓	✓	Underway	
Education Workforce Strategic Analysis	✓	✓	✓	✓	✓	Underway	
Education Work Programme Evaluation	✓	✓	✓	✓	✓	Scoping	
Addressing Learners Needs							
Implement the equity index infrastructure	✓	✓	✓	✓	✓	Scoping	
ECE - Moving Towards Pay Parity	✓	✓	✓			Scoping	
Supporting Pacific bilingual	✓	✓	✓			Scoping	
Future Education – Change Programme	✓	✓	✓	✓	✓	Underway	
Māori Data Environment	✓	✓	✓			Underway	
Attendance and Attainment		✓	✓			Underway	
Research & Evaluation Development Strategy		✓	✓	✓	✓	Scoping	

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OUR KEY INDICATORS - OUR KEY AREAS OF MEASUREMENT

Our People measures will be	Our Products will be	Our Delivery measures will be	The following are our Development priorities
Progression & Development Plans Plans are completed on time and reviewed each quarter. Refer development priorities	Accurate Measures the Accuracy and correctness of our products	<ul style="list-style-type: none"> • Time 	<ul style="list-style-type: none"> • Beyond Diversity and Te Tiriti o Waitangi
Health & Safety Measures the safety and wellness of our working environment.	Timely Measures the timeliness of our products	<ul style="list-style-type: none"> • Quality 	<ul style="list-style-type: none"> • Product development
Te Whare Tapa Whā Measures our wellness across the walls of the Whare	Relevant Measures the relevance of our product	<ul style="list-style-type: none"> • Cost 	<ul style="list-style-type: none"> • Project coordination
Climate & Culture Measures our cultural alignment and staff engagement	Understandable Measures the	<ul style="list-style-type: none"> • Process efficiency 	<ul style="list-style-type: none"> • Story Telling and presentation
Staff Turnover Measures turnover vs. govt benchmark	Impactful Measures the impact of our products on supporting priority learners.	<ul style="list-style-type: none"> • Process effectiveness 	<ul style="list-style-type: none"> • Change Management
Leadership Measures the effectiveness of our leadership		<ul style="list-style-type: none"> • Stakeholder satisfaction 	<ul style="list-style-type: none"> • Risk & Issue Management
Staff satisfaction Measures the level out staff satisfaction			<ul style="list-style-type: none"> • Tātai Pou – cultural competencies
• Te Tiriti o Waitangi >> Leaner and Whānau centric >> Partnerships >> Evidence Based >> Service-oriented>> Customer focused			

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OUR PERFORMANCE FRAMEWORK

EVIDENCE, DATA & KNOWLEDGE SCORECARD

Are we supporting the housing? Improving outcomes for priority learners and their whānau? Are we contributing to increased well-being? Are we delivering to our treaty obligations?

EDU OUTCOMES & VALUE	STATUS

Are we managing our resources effectively? Are we ready to support ESA and our treaty obligations? Are we developing Teāhiou competencies and applying those skills?

PEOPLE & TOOLS	ACTUAL	TARGET	STATUS
FTE			✓
Permanent			✓
Fixed Term			✓
Contractors		0	✓
Knowledge at Risk - plans		100%	X
Resource Capacity			✓
Progress & Development Plans			✓
Strategic Development Underway		100%	!
Leave		< 15 days	X
Sick Leave		< 10 days	!
Open Positions			!
Cultural Competencies (Total Ptu)		100%	!
Cultural Competencies (mobility)		100%	!



Are we creating the appropriate working environment? Are we caring for our staff?

WELLBEING	STATUS
Staff Pulse	WIP
Health & Safety	WIP
Well Being (5 ways)	WIP

In development

Are we covering ourselves?

SUSTAINABILITY	STATUS
Staff transport	WIP
Recycling measures	WIP
Paper volumes	WIP

In development

Is our data accurate, timely, relevant, understandable & useful to our customers? Happy? Are our efforts (quality) and fit for purpose?

QUALITY & RELEVANCE	ACTUAL	TARGET	STATUS
Customer Satisfaction			
Accuracy			
Timeliness			
Relevance			
Understandable			
Useful & impactful			
Customer engagement			
Not Quite Rights			

Are we delivering to plan? Are we improving what we offer? Are we improving? Have we got systems and processes in place for managing information privacy?

PROCESSES & SERVICE DELIVERY	STATUS
Strategic Projects	!
Core Business	✓
Data Infrastructure	WIP
Data Quality	WIP
Data Processing	WIP
Business Risk	X
Business Continuity Plan	WIP
Pipeline	!
Product development	WIP
End to End process	WIP

DEVELOPMENT PROJECTS #4
19 March 2021

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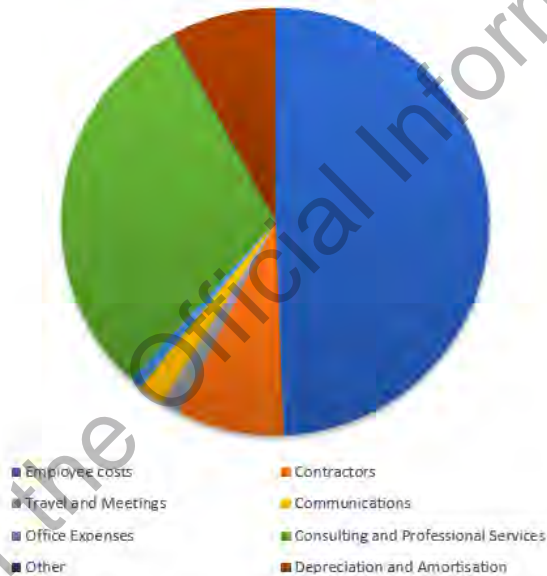
OUR BUDGET

EDK's Budget is \$37m for 2021/22:

300A-Evidence Data and Knowledge	Full Year Budget (as of Sep 21)
3000-Deputy Secretary - EDK	3,617,049
3001-IED	7,986,974
3120-Group Manager Data and Information Stewardship	1,792,649
3122-Data	2,508,361
3123-Data Solutions & Warehousing	1,573,754
3124-Information Management	879,501
3150-Group Manager Evidence, Synthesis & Dissemination	572,008
3151-Best Evidence Synthesis	446,784
3154-Customer Strategy & Channel Management	621,163
3155-Information Requests	729,499
3156-Evidence, Synthesis & Reporting	1,080,227
3157-Workforce & Strategic Analysis	-
3180-Group Manager Analysis, Research & Evaluation	1,150,474
3181-Forecasting & Modelling	1,378,034
3183-Educational Measurement & Assessment	5,396,904
3184-Analytics & Insights	3,714,377
3212-Library	679,251
Total Controllable	34,127,010
A250 : Depreciation and Amortisation	2,935,552
A260-Capital Charge	-
A271-Loss on Assets	-
Total Expenses	37,062,562

Expenditure is dominated by personnel and consultancy costs:

EDK Budget by Expense



EDK's Budget must be closely monitored, as:

1. Based on initial forecasts, projected expenditure **exceeds** available budget by around \$5m (15%); however,
2. Recruiting technical specialists in the current market is challenging. In recent times this has contributed to **underspends** and project delays.

As the year progresses we may need to either rein in expenditure to remain within budget, or have flexibility to invest in emerging priorities. We may also need to seek approval for Expense Transfers for unspent project budgets.

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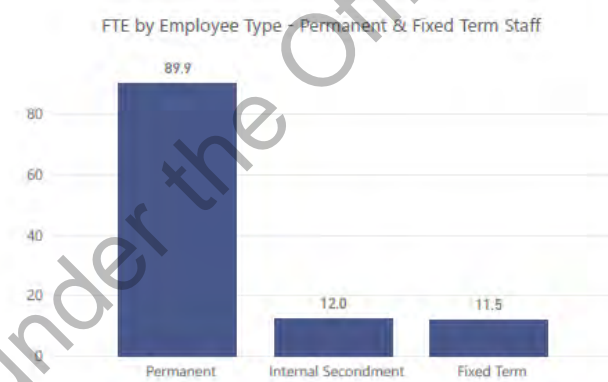
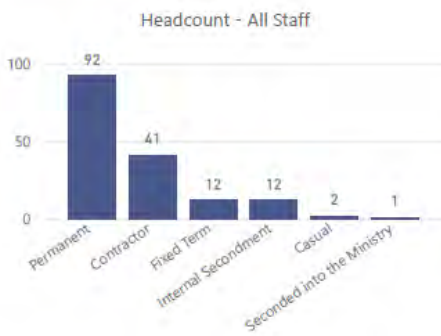
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Workforce Summary - Monthly Report

Report as of: August 2021
 Business Group: Evidence Data and Knowledge
 Division: All
 Location Group: All

FTE
113.5
 Permanent & Fixed Term

Headcount
116
 Permanent & Fixed Term



Headcount & FTE - Permanent & Fixed Term (click arrows to drill down)

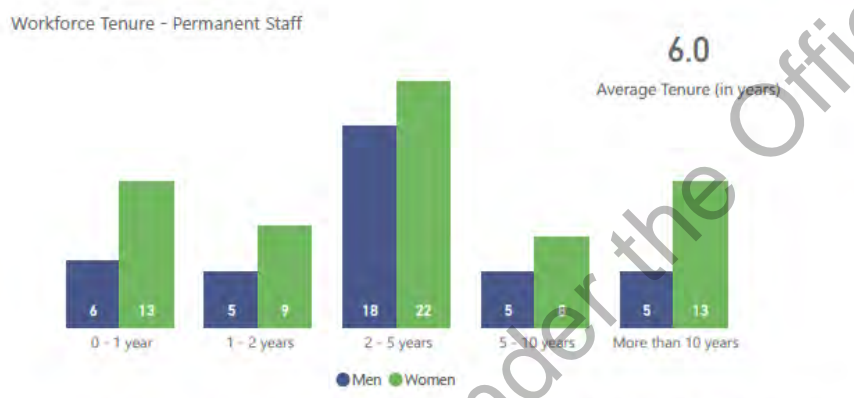
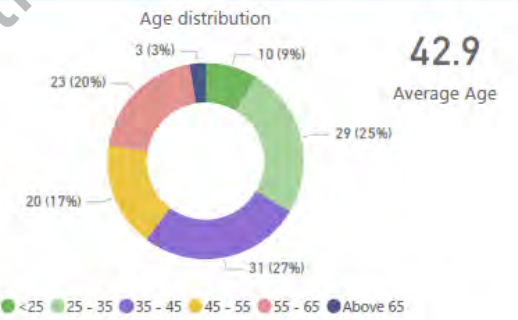
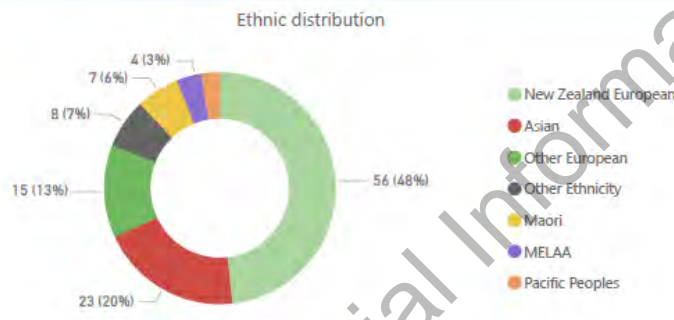
Business Group	Headcount	FTE	%
Evidence Data and Knowledge	116	113.48	100.00%
	3	3.00	2.64%
Analysis, Research and Evaluation	45	43.95	38.73%
	5	4.46	3.93%
Analytics and Insights	15	14.95	13.17%
Educational Measurement and Assessment	13	12.54	11.05%
Forecasting and Modelling	12	12.00	10.57%
Data and Information Stewardship	33	31.84	28.06%
	6	5.75	5.07%
Data	14	13.09	11.54%
Data Solutions and Warehousing	8	8.00	7.05%
Information Management	5	5.00	4.41%
Evidence Synthesis and Dissemination	29	28.69	25.28%
	5	5.00	4.41%
Customer Strategy and Channel Management	8	8.00	7.05%
Evidence Synthesis and Reporting	10	9.69	8.54%
Information Requests	6	6.00	5.29%
Office of the Deputy Secretary	6	6.00	5.29%
	6	6.00	5.29%
Total	116	113.48	100.00%

* all data excludes staff on long term leave
 * All staff headcount excludes employees seconded outside

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Workplace Demographics

Report as of: August 2021
 Business Group: Evidence Data and Knowledge
 Division: All
 Location Group: All



Gender distribution

Gender	Count	Percentage
Men	44	37.93%
Women	72	62.07%

FTEs in Union

Category	Count	Percentage
Individual Agreement	66.09	59.28%
PSA	45.39	40.72%

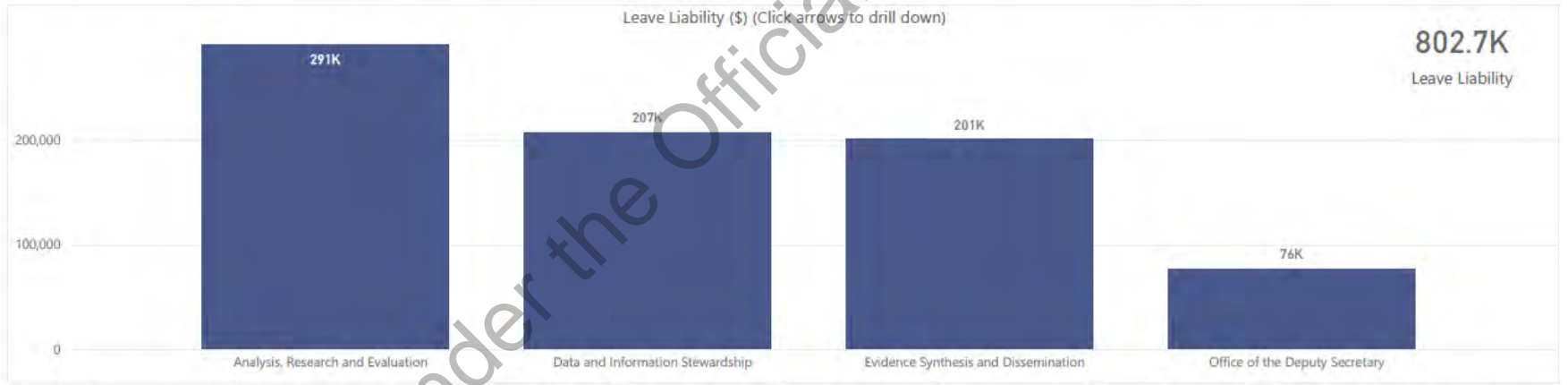
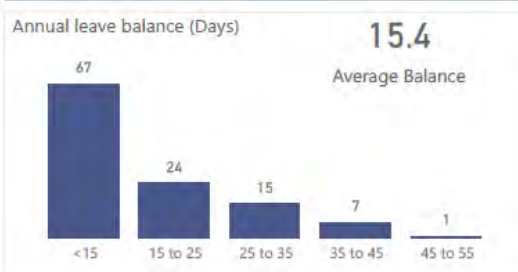
* All data (except tenure) is calculated for Permanent and Fixed Term staff, excludes staff on long term leave
 * Public service average tenure for 2020 is 8.5 years

* Public service average for union membership is 57.1% FTE in 2020

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Workplace Health Measures

Report as of: August 2021
 Business Group: Evidence Data and Knowledge
 Division: All
 Location Group: All



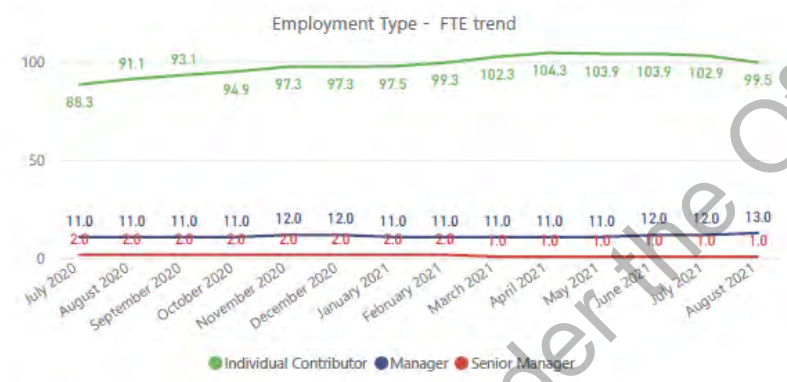
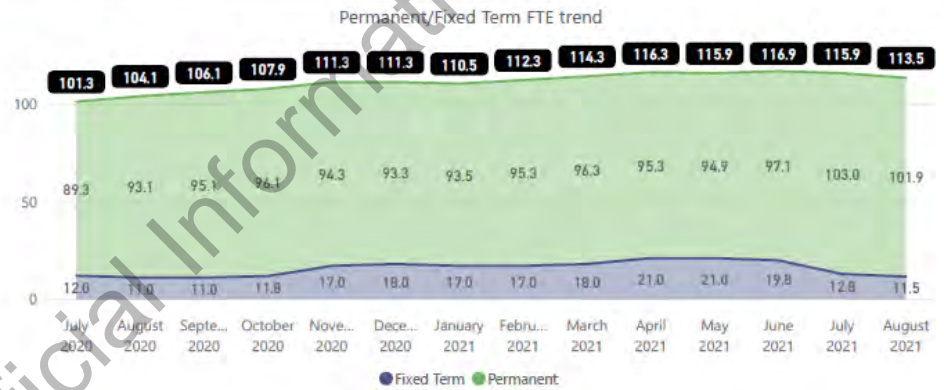
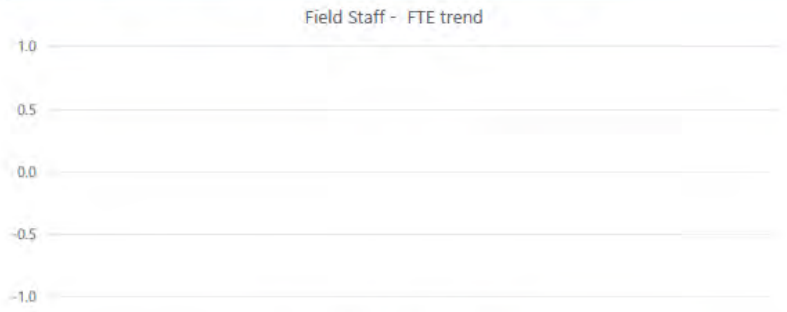
* Annual leave taken is average leave days taken in last 12 months. It includes both fixed term and permanent employees.
 * Sick leave is average leave days taken in last 12 months. It includes only permanent employees.

* Employees who do not have a division attached to them will not show up in the division break-down for leave liability.

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Workforce - FTE Trend

Date Range: 1/07/2020 to 31/08/2021
 Business Group: Evidence Data and Knowledge
 Division: All
 Location Group: All



FTE change (click on arrows to drill down)

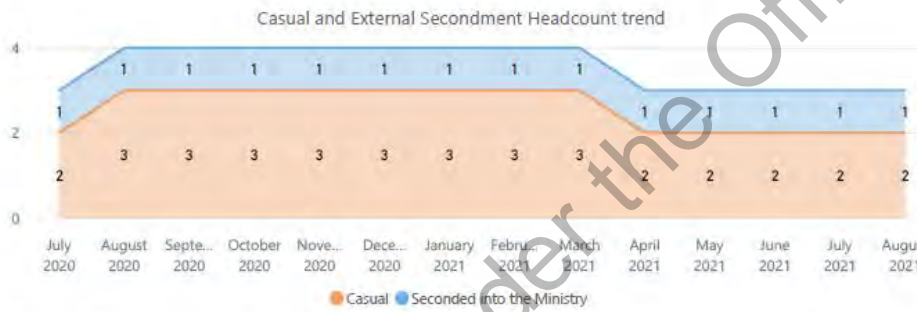
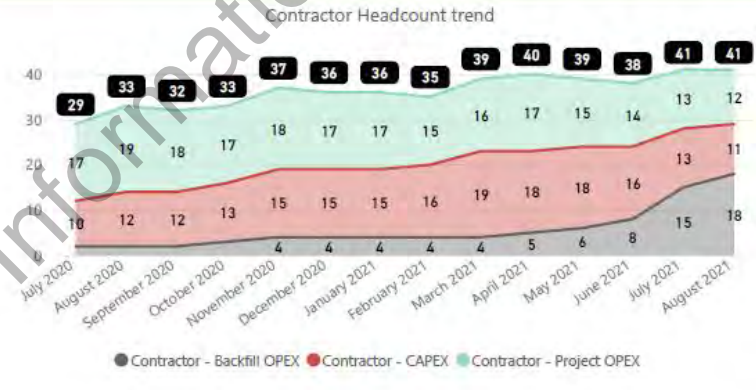
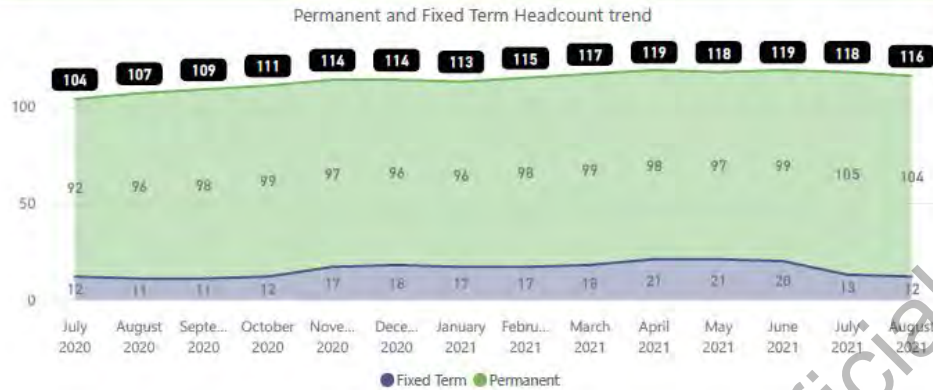
Division	Starting FTE	Ending FTE	Change in FTE	% Change in FTE
	3.0	3.0	0.0	0.0%
Analysis, Research and Evaluation	36.7	44.0	7.3	19.9%
Data and Information Stewardship	31.9	31.8	0.0	-0.0%
Evidence Synthesis and Dissemination	24.8	28.7	3.9	15.9%
Office of the Deputy Secretary	5.0	6.0	1.0	20.0%
Total	101.3	113.5	12.2	12.1%

* all data excludes staff on long term leave
 * number in the black box is the 'total' value for that trend

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Workforce - Headcount Trend

Date Range: 1/07/2020 to 31/08/2021 |
 Business Group: Evidence Data and Knowledge |
 Division: All |
 Location Group: All



Change in Contractor Headcount (click on arrows to drill down)

Division	Starting headcount	Ending Headcount	Change in Headcount	% Change in Headcount
Analysis, Research and Evaluation	5	2	-3	-60.0%
Data and Information Stewardship	23	37	14	60.9%
Evidence Synthesis and Dissemination	1	1	0	0.0%
Office of the Deputy Secretary	1	1	0	0.0%
Total	29	41	12	41.4%

* all data excludes staff on long term leave
 * number in the black box is the 'total' value for that trend

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Leave Trend Data

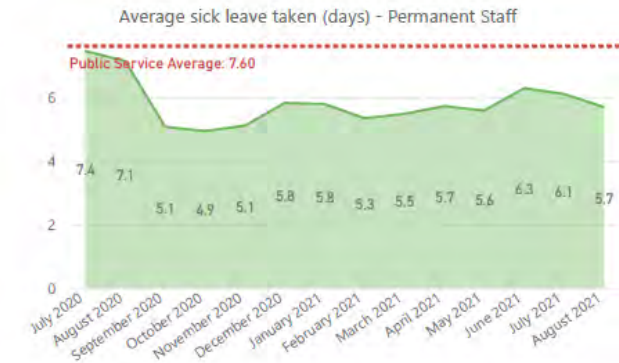
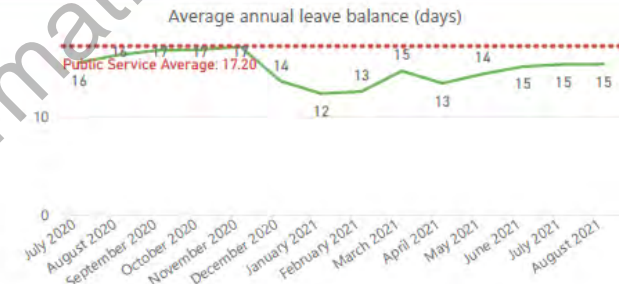
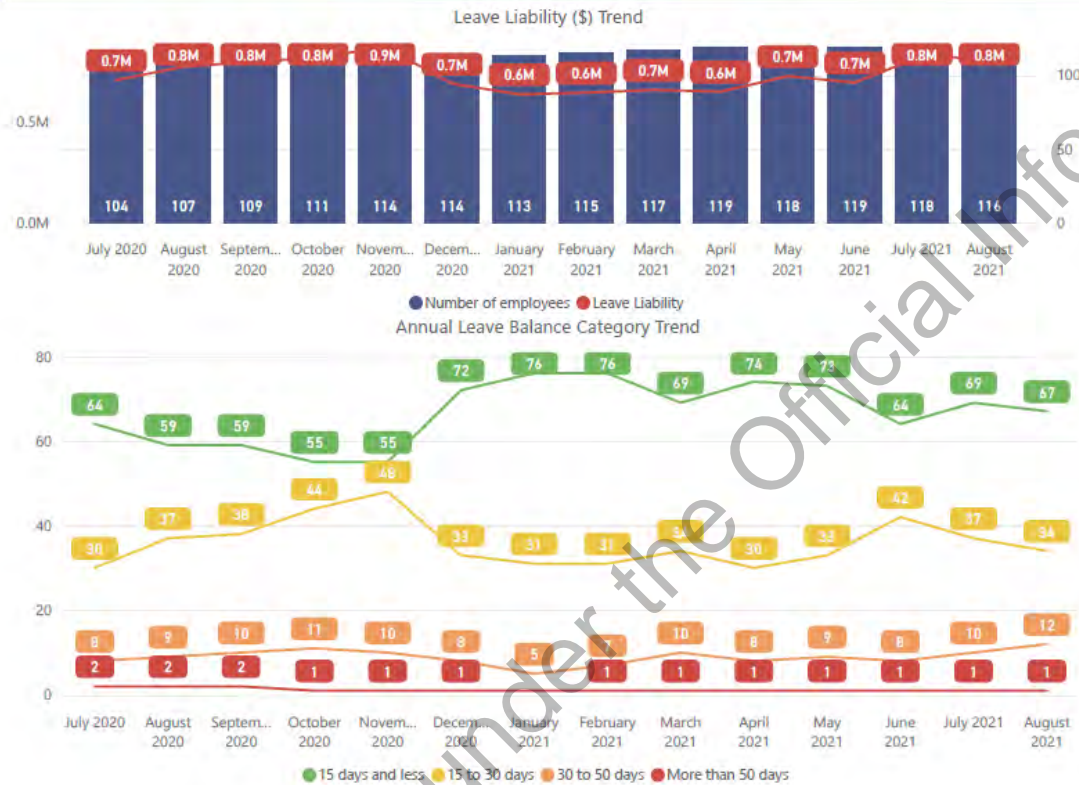
1/07/2020 31/08/2021

Business Group

Evidence Data and Knowledge

Division

All



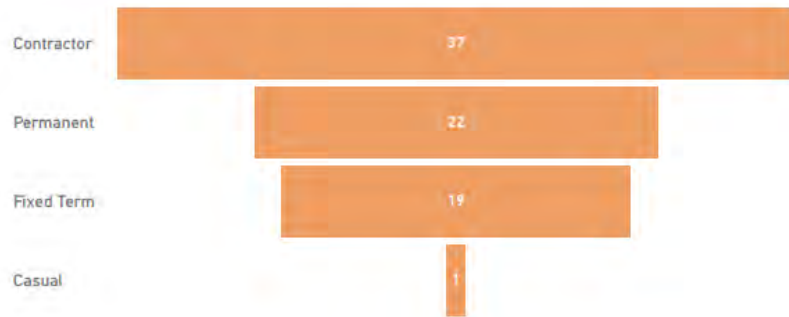
* All data excludes staff on long term leave

* Data includes Permanent and Fixed Term staff

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New Hires Data

1/07/2020 31/08/2021 Business Group: Evidence Data and Knowledge Division: All Location Group (Name): All



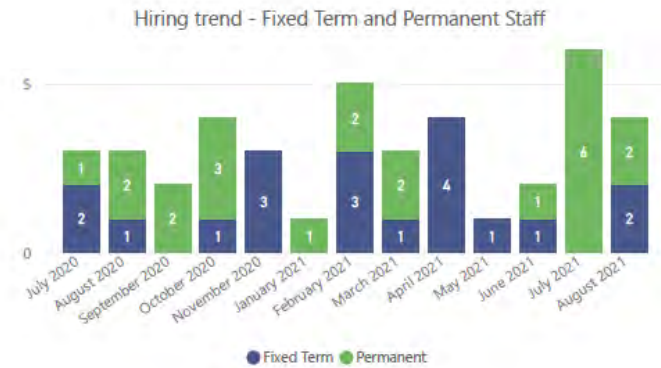
Hiring by employee type (Click arrows to drill down)

Division (Label)	Contractor	Fixed Term	Permanent	Total
Analysis, Research and Evaluation	5	9	11	25
Data and Information Stewardship	27	1	7	35
Evidence Synthesis and Dissemination	4	5	3	12
Office of the Deputy Secretary	1	4	1	6
Total	37	19	22	78

17
Contractor - Backfill Hires

12
Contractor - CAPEX Hires

8
Contractor - Project Hires



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Turnover Data

Business Group	Division	Learning Support	Location
Evidence Data and Knowledge	All	All	All



Gross Turnover is the rate of staff turnover for both planned and unplanned reasons including both fixed-term and permanent staff. Planned termination reasons include "End of fixed-term contracts", "Redundancies", "Redeployment to another organisation", "Retraining" and "Enhanced early retirement". Unplanned termination reasons are detailed in the core unplanned turnover definition below.

Calculation - $\text{COUNT}(\text{terminated staff on permanent and fixed-term contracts who left in the last 12 months for any reason}) / [(\text{Current year's headcount} + \text{Previous year's headcount}) / 2] \times 100$



Unplanned Turnover is the rate of staff turnover for unplanned reasons. Includes permanent staff only. Unplanned termination reasons cover resignations, retirements, dismissals and death, as well as unknown reasons. (Excludes fixed-term employees.)

Calculation - $\text{COUNT}(\text{terminated permanent staff who left in the last 12 months due to resignation, retirement, dismissal or unknown reasons}) / [(\text{Current year's permanent headcount} + \text{Previous year's permanent headcount}) / 2] \times 100$
(Excludes fixed-term employees.)

* All exit data is from June 2020 onwards

* Data is for fixed term and permanent exits only

Exit Data

1/07/2020 31/08/2021

Business Group (Label)

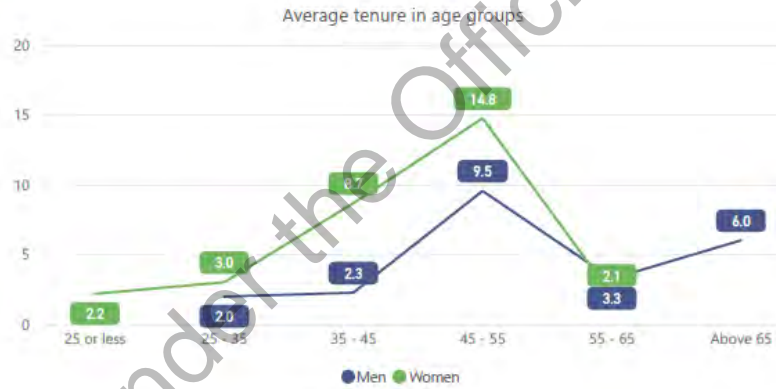
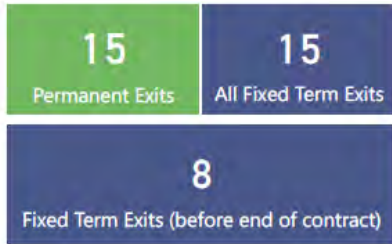
Division (Label)

Location Group (Name)

Evidence Data and Knowledge

All

All



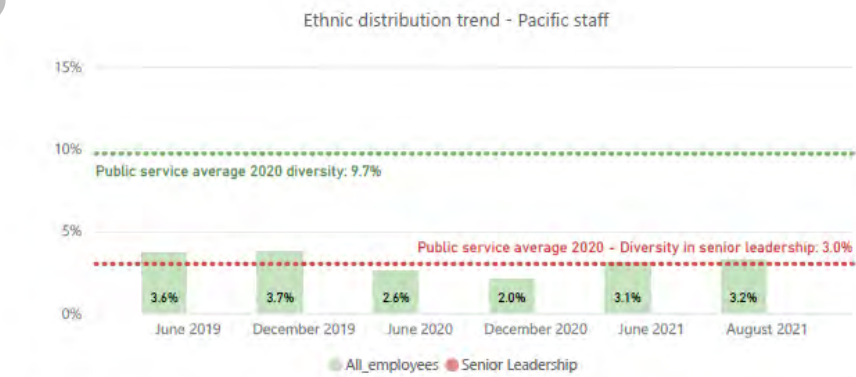
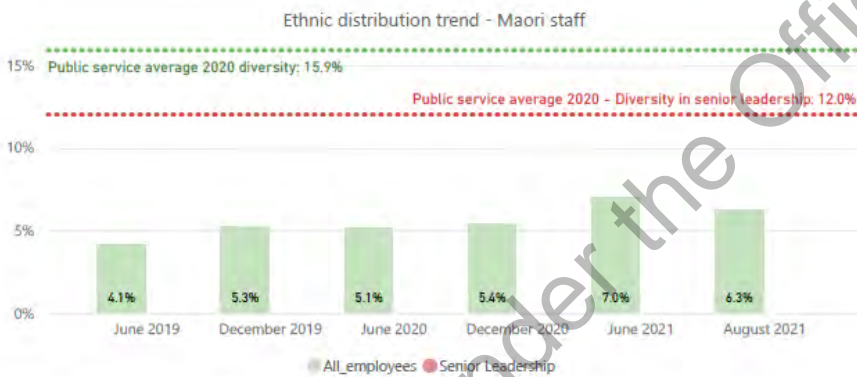
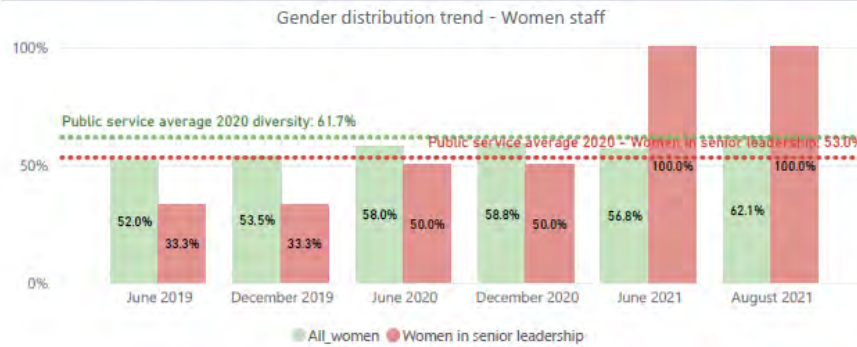
* Average tenure is calculated for Permanent Staff only

* All exit data is from July 2019 onwards
* Data is for fixed term and permanent exits only

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Staff diversity - Ethnicity & Gender

Business Group: Evidence Data and Knowledge | Division: All | Location Group: All



* According to NZ Stats 2019 data, NZ has 70% European, 16.5% Maori, 15.3% Asians and 9% Pacific People

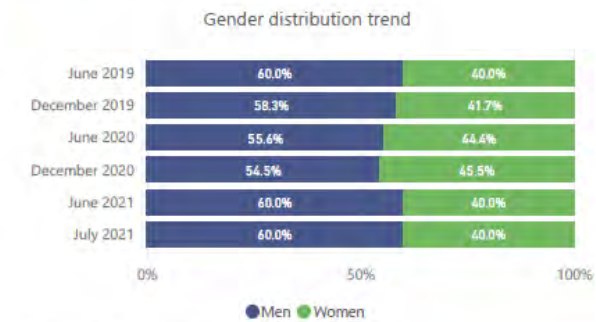
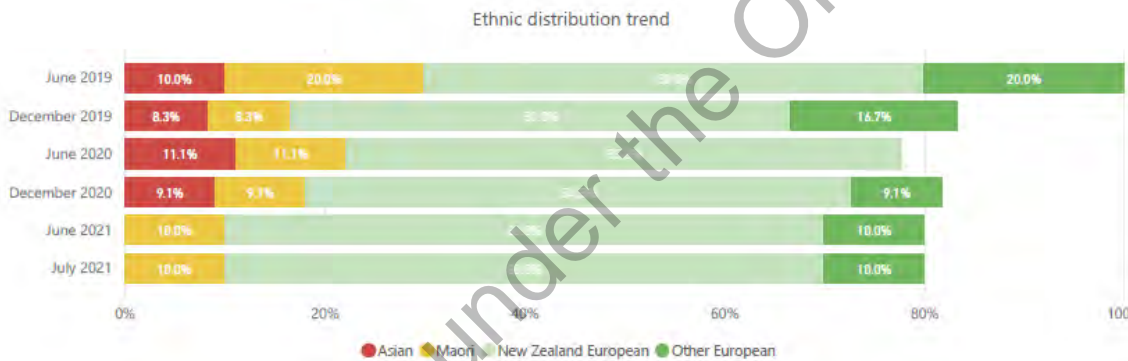
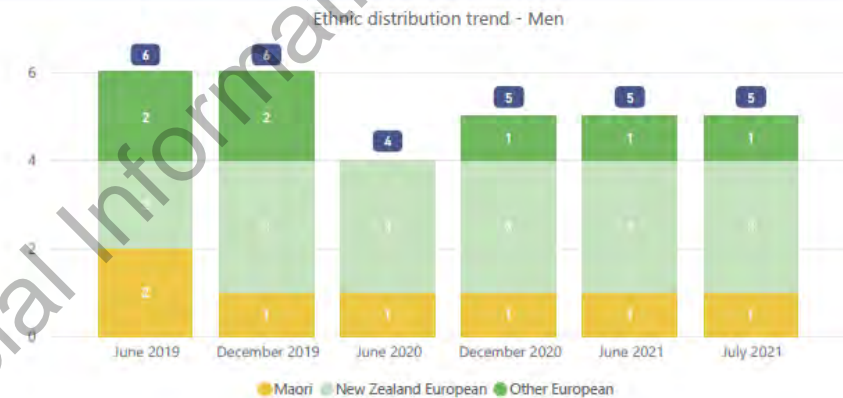
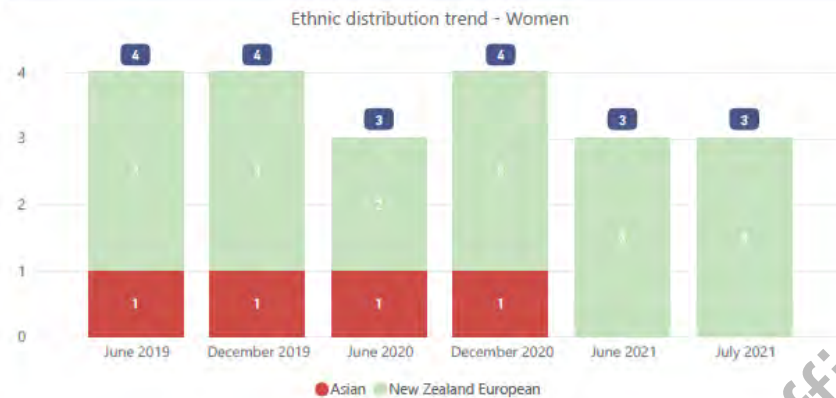
* Senior Leadership is Tier 2 & 3 employees

* Data includes Permanent and Fixed Term staff

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Staff diversity - Ethnicity & Gender

Business Group: Evidence Data and Knowledge |
 Division: All |
 Location Group: All |
 Band (groups): Managers |
 Age Group: All

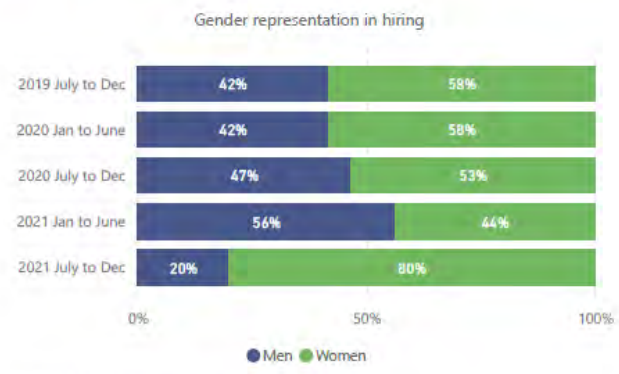
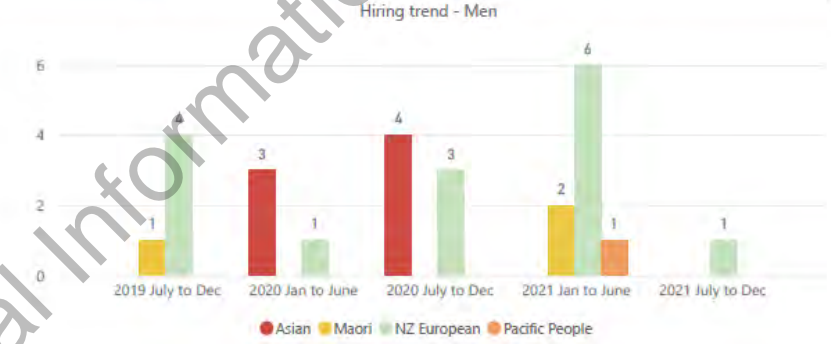
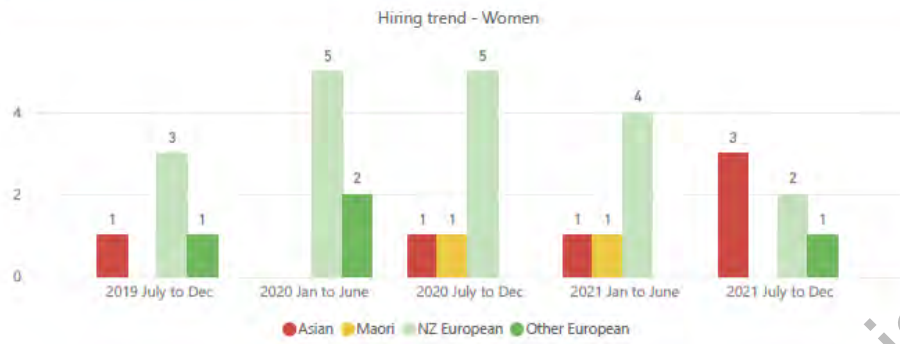


* Data is for fixed term and permanent staff only

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Diversity in Hiring

Business Group: Evidence Data and Knowledge | Division: All | Location Group: All | Band (groups): All



* All hiring data is from July 2019 onwards
 * Data is for fixed term and permanent (new) hires only

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