

Public/Private Partnership Schools in New Zealand: Justifications and Context

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Abstract

Recent policy changes in the New Zealand educational context have introduced privatization into the system through partnership schools. Parties on all sides of the issue use a framework of economic values consisting of efficiency, equity, and liberty to frame themselves and their opposition. This holistic case study uses interviews, observations, and field evidence to explore how partnership and public schools align themselves with these values, and how public discourse frames both types of schools. Cross analysis of the different voices revealed differences in constructions concerning innovation, how best to serve struggling learners, school funding, and school evaluation. These differences fuel the debate in the public sphere. The results from this study can help guide the construction of research questions and focus the inquiries of the U.S. charter school context to the underlying economic assumptions of different stakeholders, along with directing further research in the New Zealand context.

Keywords: charter school, comparative education, education policy, New Zealand

Governments around the world have turned to policy that partially or fully privatizes public concerns; in education, this means increasing partnerships between the government and private interests to start and run schools (Patrinos, Barrera Osorio, & Guáqueta, 2009).

Commonly referred to as charter schools, these schools are founded on a contract between an organization and the government that outlines the roles and responsibilities of the different parties. Generally, the government provides funds and charter organizations run the school

using procedures, pedagogies, and philosophies outlined in the charter. This agreement includes accountability structures, which are different from the public school accountability procedures (Loveless & Jasin, 1998).

Governments have turned to privatization in education to capitalize on the benefits of markets perceived in other sectors (Adnett, 2004). These benefits can be framed through an economic values framework consisting of efficiency, equity, and freedom (Stone, 2012). The marketplace is driven by the assumption that different actors maximize outcomes to increase efficiency in processes and resource use (Taylor, 2010). The free market depends on freedom of choice; in education, this means parents choose their children's school. According to Friedman (2002), this freedom allows for more equitable outcomes because it enables parents to seek what is best for their students. Advocates for charter schools invoke the values associated with a free market to argue for increased privatization.

Internationally, charter school policy is at different stages of development (Patrinos et al., 2009). The recent creation of partnership schools *kura hōrua*¹ in New Zealand provided a rich environment in which to study the ways different parties talk about these economic

values. The debate surrounding these new schools is taking place in the schools themselves, the media, and around dinner tables. This study was led by one question: What does an economic values framework reveal about the partnership school policy and the ways different stakeholders conceptualized it? Results related to this framework can be used to inform the shape and content of research in the charter school debate in the United States, particularly highlighting the nature and importance of how these economic values were conceptualized.

Theoretical Framework

Partnership schools emerged from the political and social conditions of the previous educational system. According to Stone (2012), conditions are problematized in the public sphere through the use of values. Levin (2004) evaluates school choice initiatives through four values: freedom of choice, productive efficiency, equity, and social cohesion. Based on the data available, this study used the economic values framework of efficiency, equity, and liberty as a way to view rhetoric around partnership schools in New Zealand.

Efficiency

Efficiency is broadly defined as maximizing the most outcome

for a given input, or achieving a goal at a lower cost (Stone, 2012). Taylor (2010) conceptualizes efficiency in three different ways: technical, allocative, and scale. A system is technically efficient when it is impossible to reduce inputs without reducing outcomes. Allocative efficiency is concerned with the choice of inputs. Systems have more allocative efficiency when they use the best mix of inputs, given cost and productivity. The third dimension of efficiency is scale. Here, a system is efficient when there are no productivity gains with change in size. These dimensions provide different views of efficiency in schools.

Efficiency in education is concerned with “how much education or knowledge is delivered to—and acquired by—students and at what cost” (Rolle, 2004, p. 44). Writers on educational efficiency argue that optimal schooling models can be achieved by allowing school autonomy and parental choice (Chubb & Moe, 1990). However, educational systems have restraints that keep them from functioning in the same way as a free market (Ladd, 2002). There are multiple stakeholders, attendance is mandatory, and parents may have different perceptions of school quality. A market system relies on parents acting in a rational and self-interested manner (Stone, 2012).

However, for many individuals and communities, pure self-interest is not the only motivator when schools are involved (Levin, 2002).

Outcomes from the educational system are similarly multiple and diverse. Over time, the valued outcomes from schools have changed greatly (Rothstein & Jacobsen, 2006). People’s positions on the purpose of school affects what they value (Labaree, 1997). This is further complicated when the community perspective is considered (Stone, 2012). Efficiency depends on how inputs and outcomes are valued.

Equity

Equity in education can be framed in a number of ways. Guthrie and Rothstein (2001) argued that equitable schools provide sufficient resources to ensure that students have an effective opportunity to achieve appropriate levels of knowledge and skills. This definition considers the equity of inputs, processes, and outcomes. Another dimension of equity is a consideration of the target population of those inputs (Baker & Green, 2013; Berne & Stiefel, 1994).

Distribution processes invoke complex equity considerations. Resources can be distributed in a combination of horizontally and vertically equitable ways (Baker & Green, 2013). Horizontal equity is

the equal treatment of equal individuals or groups; vertical equity is the unequal treatment of unequal individuals or groups. Distribution processes can also provide equity of opportunity (Roemer, 1998). These processes allow individuals who put forth the same effort to achieve at the same level. Instead of focusing on how much to give to different individuals or groups, or holding them to different standards, barriers are removed so that they can put forth their own effort and not be impeded. Discussions regarding equity in education involve issues of who, what, how, and how much (Berne & Stiefel, 1994), while trying to make room for self-determination.

Liberty

According to Friedman (2002), liberty consists of two elements: freedom and choice. The concept of freedom can be framed in either a positive or negative way (Berlin, 1969). In the positive framing, individuals are self-directed, choose their own goals and policies, and are driven by their own purposes. To support this concept of freedom, the government provides support for individuals to achieve their goals. In the negative framing, freedom means the absence of coercion; the individual is not constrained by others (Berlin, 1969). To support this type of freedom, government should

refrain from acting and not interfere with individual action (Stone, 2012).

The second element of liberty is the concept of choice (Friedman, 2002). For an individual to have liberty, there must be a range of options from which to choose. In the educational context, this implies that parents should have a range of schools from which they can choose to send their child. Parental choice is rooted in the idea of utility maximization, that parents will choose the school that is of the highest perceived quality, based on their values (Chakrabarti & Roy, 2010). These choices are impacted by school demographics, academic performance, location, and school atmosphere. The role of information is important when considering choice; even when parents have preferences, they may not align their decisions with those preferences if they lack adequate information (Chakrabarti & Roy, 2010).

The New Zealand Educational Context

The New Zealand education system has undergone a number of changes since it was established in 1877. Progressivism, social change, and economic pressures have driven reforms around curriculum and decision-making, with the current governance structure laid out in

policy documents from the late 1980s and early 90s (Shearer, 2002). Market-based reforms were expanded and modified in the 1990s (Ladd, 2002). The most recent major reform was the creation of partnership schools in the Education Amendment Act of 2013 (Education Amendment Act 2013).

Public Schools

Schools in New Zealand are generally divided into primary (years 1–6), intermediate (7–8) and secondary (9–13) levels. Schooling is compulsory for students aged 6–16, but children have the right to begin attending school on their fifth birthday. Ninety-six percent of students attend some form of state school. These schools have geographically defined zones from which they draw students; however, students may apply to go to a school outside of their zone. New Zealand has a nationally adopted curriculum taught in state schools for years 1–10 (Ministry of Education, n.d.).

Governance of schools in New Zealand is decentralized. Local elected boards of trustees, commonly comprised of parents, hold the power to govern and manage schools. These boards hire a principal and together they are empowered to make decisions on how to allocate funds, hire personnel, and implement programs of study. Schools are

funded from the central government according to the socioeconomic status of the surrounding neighborhood (their “decile”)². Schools with the highest proportion of students from low socio-economic communities are decile 1, with increasing socio-economic status corresponding with increasing deciles. Capital investments such as building projects are proposed to and approved by the Ministry of Education. The Education Review Office (ERO; 2016) evaluates schools approximately every three years on indicators around student learning, teaching, family engagement, school culture, governance, and leadership. Schools are expected to self-evaluate in addition to the cycles of external evaluation.

Partnership Schools

The first five partnership schools opened in 2014, with four more in 2015. New and existing educational trusts applied to operate these first partnership schools. The Ministry of Education (2011) justifies partnership schools in this way:

Currently four out of five New Zealand students achieve educational success, but one in five does not. These schools have greater freedom and flexibility to innovate and engage with their students in return for stronger accountability for improving educational out-

comes. These schools focus on the Government's priority groups: Māori, Pasifika, learners from low socio-economic backgrounds and learners with special education needs—helping all New Zealand students reach their potential.

The Māori people are the largest ethnic minority in New Zealand and constitute approximately 15% of the population. Pasifika is a designation given to ethnic minorities in New Zealand from other Polynesian islands and constitutes approximately 8% of the population. Partnership schools are expected to draw a certain percentage of their students from these priority groups (Ministry of Education, 2011).

Funding for partnership schools comes from the central government³. Schools are funded at approximately the decile 3 level; however, per pupil funding is higher than a corresponding decile 3 state school because the partnership schools manage their own capital expenses. Whereas property and insurance costs for state schools are funded separately, those costs fall into the general budget at a partnership school. Funding is based on three-year projected enrolment, which is determined based on school capacity.

Partnership School (PS) Sites

PS1. PS1 opened in 2015 and serves 135 students in years 7-10. The school describes itself as operating in a middle school model, rather than as a traditional New Zealand intermediate. In the literature provided by the school, it differentiates itself from other schools through small class sizes and project-based learning curriculum. Class sizes are held to 15 students, approximately half the size of comparable local schools. Principals, who double as “academic managers,” oversee houses of four class groups. Students move through their day taking different subjects with different teachers within their house.

Students have independent work time built into their week when they work on their projects. Projects consist of 20-25 teacher-determined tasks that span disciplines and are related to one topic. Example tasks from the eighth grade “Human Beings” project included reading an account of human achievement or endurance in extreme conditions, graphing the New Zealand population from 1840–2013, and creating a timeline of the Roman Empire. Students are expected to complete all the tasks in the project. PS1 highlights this project-based curriculum as one of the things that makes it different from public schools.

PS2. PS2 opened in 2014 to serve students in years 11-13. The school self-identifies as a military academy, although it does not have formal ties with the New Zealand armed forces. The school evolved from an existing one-year program that served individuals who had completed secondary school and wanted to learn skills and discipline to help them join the military and provide structure in their lives. The founders applied to become a school through the partnership school framework and were accepted as an inaugural site. In 2015 the school served 140 students, with plans to expand to 192 over the next two years. Class sizes at PS2 are smaller compared to standard public secondary schools.

The literature about the school stresses the military content and structure of the school day. Students wear military-style uniforms and complete regulation physical training daily. They learn military history and the structure of the New Zealand armed forces. Curriculum includes information about different military bases, the roles of different ranks, and what firearms are used. Outside of the military content, the school follows a narrow curriculum based on New Zealand graduation requirements. Although not all graduates pursue a military career, it is a commonly chosen path.

Methods

This study emerged from a two-week experience visiting schools and engaging with educators on the North Island of New Zealand, based out of the Auckland area. I chose an holistic case study with multiple units of analysis (Yin, 2014). The case was the New Zealand education environment, and the units of analysis were partnership schools, public schools, and the public discourse around the issue. The case was bounded by the specific context and the time period of the study (Creswell, 2013).

Data Collection

Data collection consisted of numerous interactions in public and partnership schools in New Zealand. Through these experiences I was able to collect data through interviews, observations, and collection of other field evidence (Creswell, 2013; Yin, 2014). I identified a number of key informants to interview in order to access and understand the context (Creswell, 2013). I visited two partnership schools and conducted a semi-structured interview with the business manager from each school. Questions focused on how the schools came into being, and different elements of teaching and learning at the school. Open-ended prompts included:

- Describe the history of the

school.

- What are the benefits to being a partnership school?
- What are the challenges to being a partnership school?
- What benefits does your school provide to students?
- How do you market your school?
- How do you gauge success at the school?

Each interview was approximately 45 minutes in length. I also had a number of informal conversations with teachers and principals in the public school system about these topics. During these conversations I wrote field notes, which were later converted to memos (Savin-Baden & Major, 2012).

Observations

Observations were unstructured and conducted as a participant observer in the cultural context (Creswell, 2013). I conducted observations of students and teachers engaged in normal school activities at the two partnership schools. I also visited three public schools in the same area and viewed portions of the normal school day. Following these observations, I wrote researcher memos to capture meaningful events and comments (Savin-Baden & Major, 2012).

Field Evidence

Field evidence is data from the physical and social environment created for reasons unrelated to the research study (Yin, 2014). Field evidence consisted of documents and photographs from schools. Additionally, I visited school websites and reviewed their missions and self-descriptions. To gain an understanding of the wider conversation, information was gathered from the New Zealand Ministry of Education website, the ACT Party, the New Zealand Post Primary Teachers Association, and the New Zealand Herald online.

Data Analysis

Data analysis consisted of within-unit analysis to provide a description of the themes (Creswell, 2013) in the New Zealand educational setting as related to partnership schools. I used prefigured codes (Crabtree & Miller, 1992) that described elements of the different constructs of the theoretical framework. I reviewed data from the different sources and grouped them according to the source, then coded interview transcripts, documents, and memos according to different facets of the three values. I then wrote descriptions of the different levels of analysis and compared these descriptions to perform a cross analysis of the areas of analysis.

Findings and Discussion

In this section, I describe the themes related to equity, efficiency, and liberty as they were reported within each of the foci of analysis: the visited partnership schools and the visited public schools. Then, I consider components of the three values, and how data from the different sources relate or are disparate.

Efficiency, Equity, and Liberty in the Partnership School System

Partnership schools present themselves as efficient in many different ways. They believe they are more technically efficient because they have more control over the way they structure the work hours and staff. Partnership schools are able to remove the slack they see in the public system. PS1 said they could be “leaner” by only paying teachers for instructional hours. PS1 uses principals to teach classes, as business decisions are made by the educational trust that runs the school, rather than the public school model where principals take the lead on business decision-making. The school leases classroom space from a local church, and uses the surrounding community infrastructure as a learning environment. In their promotional material, PS1 talks about parks, libraries, and museums as being part of their instructional space.

Similarly, PS2 leases space that had previously been offices and a warehouse. They too have a business manager and a board consisting of “professionals” that make financial decisions. According to the business manager, public school principals are not trained to make such decisions, and his business background better qualifies him. Students at PS2 completed many duties that would be done by custodial staff at public schools, allowing for a different use of those funds.

These schools talked about liberty in a number of different ways. First, partnership school policy allowed them to freely implement their models in publically funded schools. Business managers from both schools said they would not be allowed to run their schools in the public system. Additionally, these schools are unhindered in how they spend their funds. They can cut administrative staff to pay for more teachers, resulting in smaller class sizes. These schools presented this freedom from regulations that govern traditional schools as a strength. In general, partnership schools promote themselves as providing more choices for students and parents. PS1 promotes itself as being a “choice that all students could make.” Alternately, the business manager at PS2 understood that the school is not for

all students, but believed that it is important to provide the choice for the students who need it.

With regard to equity, partnership schools pointed to the horizontal equity of the distribution of funds from the central government. Both business managers spoke of being funded at the decile-three level. They also said opponents of partnership schools did not fully understand their funding structures because their funds are combined instead of being partitioned for different target populations or programs. They presented their funding as being equitable when compared with other schools.

In the materials from these schools, they also pointed to a horizontal equity of process for students. At PS2, all students were treated with the same expectations and consequences. At PS1, all students were expected to complete the same projects. Across the partnership school system, schools indicate that they use the New Zealand curriculum. They also note that the academic standards at their schools are often higher than in public schools. Both partnership schools mentioned working with the ERO to help evaluate their schools on these standards. These schools framed equity as processes and standards that hold for all students.

Efficiency, Equity, and Liberty and the Public School System

The public schools I visited expressed efficiency, equity, and liberty in a number of ways. Regarding efficiency, public schools have limited control over the inputs in the system. Students in their zone have the right to attend the school. Regulations regarding zone transfers are strict compared to open-enrollment procedures in the US. Public schools only employ accredited teachers, who work under a common contract and have set hours. School funding levels are determined by the surrounding neighborhood. Additionally, some funding is targeted at certain populations or projects. In the public system, inputs are externally controlled.

Additionally, public schools have limited control over the expected outputs of the system. At the secondary level, students sit for the National Certificate of Educational Achievement that determines their degree. However, at the primary and middle levels, schools are more able to identify the student outcomes they value. This allows for more flexibility in processes at these levels; schools can choose to value different skills or habits of mind, and implement a variety of programs.

According to the Ministry of Education, “[t]he greatest challenge facing the schooling sector is produc-

ing equitable outcomes for students.” (Ministry of Education, 2011, p. 23) Equity in the system takes the form of vertical equity, with differentiation and personalization based on the needs of different learners. Principals and teachers at these schools discussed reaching every child. The schools provided special support staff and personnel to help English Language Learners and students who had academic difficulties.

The structure of the public system allows for principals and schools boards to make many choices about the education in their schools. Schools can use different pedagogical techniques as long as the community consents. This leads to a number of different models within the public school. For example, one public high school I visited had different “houses” based on students’ self-identified ethnicity. They use critical pedagogies to help students make sense of their own identity and how the surrounding culture constructs that identity. Another school employed an anti-fascist curriculum, and the students learned and reflected on philosophy. The principals and teachers at the sites I visited talked about their different approaches and implementing new models with approval of the board.

However, the public system regulated the degree of freedom with

some choices.. They are required to teach the standardized New Zealand curriculum. The schools are reviewed by the ERO, which uses a nationally adopted process to evaluate schools. Informally, schools must answer to their local community. Since the schools are situated in neighborhoods and educate the local children, there are many conversations about them in the community. The school boards are generally made up of parents as well, who bring concerns to the principal.

Different Constructs From Different Voices

Partnership schools, public schools, and public voices all valued efficiency, equity, and liberty. However, they constructed each other in different ways in the larger conversation. Four themes of differences emerged: attitudes on how best to serve struggling learners, perceptions of how schools can best innovate, perceptions of school funding, and perceptions of school evaluation. Differences in these constructions fueled the larger debate.

Public schools and partnership schools differently construct how to serve struggling learners. Public schools use differentiated responses within their schools to try to help all students in succeeding. They use a vertically equitable model,

and may develop different supports for the wide variety of learners who attend their school. Partnership schools instead provide a specific model and offer students the freedom to attend their school. Once students make that choice, the school implements the same techniques and programs with all students.

Partnership schools use a horizontal understanding of equity in their approach to serving struggling learners. Supporters of privatization argue that the best way to serve struggling learners is to provide a more comprehensive selection of models to better meet the students needs. Opponents of partnership schools argue that these models are not proven to help the target populations. The differences in perceptions of how to best serve struggling learners are at the core of the debate around this issue.

Many different voices in the New Zealand context talked about how schools innovate and change. Public schools are free to change the ways in which they do teaching and learning. Because of the local makeup of the school board, these innovations are both responsive to the wants of the community and constrained by local attitudes. Innovation can be driven from within the school or by the parents and others in the neighborhood. Changes hap-

pen within the existing school, with its pre-existing collection of teachers and students. This adds another level of negotiation for innovation, as new policies are interpreted by teachers and reacted to by students. Innovation is long and negotiated, but the overall structure allows for freedom of choice.

From the partnership school perspective, innovation is best done by creating new schools with specific approaches to teaching and learning. Parents and students are informed of the models of schools they can choose to attend. Teachers are also informed of each school's model and are expected to enact it. Proponents of partnership school policy argue that the market drives innovation. If a school is not beneficial to students, parents will not choose to send their students to the school, and it will close. Other schools with different models will open to fill those spots, thus driving innovation in the system, rather than within the school.

Public schools and partnership schools are funded in different ways. From the partnership school perspective, the funding scheme is equitable, in that they are funded at a per pupil level based on the public decile system. However, the model in which they are funded is different; funds are not directed at different populations or projects. Supporters

of partnership schools frame this as promoting liberty. From the oppositional perspective, partnership school funding is constructed differently. They consider overall numbers and decouple per pupil funding from the other targeted funds that go to schools. Critics of partnership schools also make the point that partnership school populations are based on three-year projections, rather than actual enrollment. The funding structure in this construction is inequitable, and partnership schools are getting special assistance.

The different perceptions of school evaluation are based on similar alternate constructions. Both traditional public schools and partnership schools work with the ERO to evaluate their schools. Partnership schools frame this evaluation as demonstrating that they are more efficient, because their target outcomes are often higher than public school outcomes. Opponents of partnership schools argue that the system is inequitable because there is no public knowledge or oversight of the partnership school evaluation system. Partnership schools have more lenient transparency requirements regarding results and student outcomes than public schools.

Implications from the U.S.

Context

Partnership schools are a new phenomenon in the New Zealand context, and the ways different stakeholders talk about the system will continue to evolve. Making comparisons across international systems is problematic; even in an increasingly globalized world, local context continues to matter (Crossley & Jarvis, 2001). However, findings from the US context could be used to help form research questions and perform inquiries that would inform the New Zealand public school conversation.

Researchers have found increased efficiency in US charter schools when using outcomes related to math and reading scores (Flaker, 2014) and value added models (Grosskopf, Hayes, & Taylor, 2009). Supporters of partnership schools project these increased outcomes, and use them to indicate increased efficiency. Although public schools and partnership schools are evaluated in different ways, cross-school comparisons would be useful for both proponents and detractors to structure their arguments. As graduation and performance data for partnership schools becomes available, comparisons could be made as the data becomes available.

In both the public sphere and

within partnership schools, stakeholders spoke about the importance of providing a choice of models for students and parents. However, the presence of school choice policy does not necessarily lead to diverse models entering the playing field (Lubienski, 2003). Over time, charter schools have become less innovative, more resembling the public schools in their context (Renzulli, Barr, & Paino, 2015). Partnership schools stressed the differences in their approaches to education. This argument weakens over time, and stakeholders on all sides of the issue may benefit from monitoring the true diversity of models offered in partnership schools.

Finally, many complex factors influence how parents and students go about choosing schools in a policy environment that provides for choice (Arsen & Ni, 2008). Factors such as race (Jacobs, 2013), feelings about community (Bosetti, 2000), and perception of the school (Levin, 2004) drive decisions about where parents send students. Supporters of partnership schools assume parents will make choices about schools based on which will provide the best educational outcomes. Further research into what drives school choice in the New Zealand context could help refine the conversations about the partnership school system and

provide additional perspective to the charter school environment in the US.

Conclusion

Privatization is a trend in education that is growing internationally, including in New Zealand, where the partnership model has been introduced into the public system. Arguments for and against these schools appeal to values of efficiency, equity, and liberty. However, each side views themselves as meeting these values in different ways. They also conceive of their opponents as in conflict with these values. These different views have fueled ongoing debate about the merit of each type of school. Because of the different constructions, debate continues. As partnership schools begin to serve more students, further research could increase our understanding of the influence that partnership schools have on the education system, and their success with meeting the needs of struggling learners in New Zealand.

The ongoing debate concerning privatization of public schools in New Zealand also provides motivation for scholars in the US context to continue to challenge our assumptions about charter schools and the justifications behind them. The arguments made for privatization were eerily similar to those used to further the charter school movement.

However, there are significant differences between our two educational systems. A careful consideration of the global privatization movement can provide critical insight into the continued debate and underlying assumptions related to charter schools in the U.S.

¹ Official titles and phrases in New Zealand generally take the form of English followed by *te reo Maori*. For simplicity, I shorten this to “partnership schools” for the remainder of the report.

² Schools with the highest proportion of students from low socio-economic communities are decile 1, with increasing socio-economic status corresponding with increasing deciles. However, a school’s decile does not indicate the overall socio-economic mix of the school.

³ Although policy was constructed to encourage the private groups to contribute to the PSKH funding, currently all partnership schools rely solely on government funding.

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