



Child Poverty Action Group, P O Box 56 150, Dominion Road, Auckland
<http://www.cpag.org.nz/>

The Irony of the NCEA:

How Compulsory Exam Fees Prevent the Achievement of Students from Poor Families

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Prepared for: **Child Poverty Action Group**
Researcher: **David Hawk**

Child Poverty Action Group

Scoping Project

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Topic: To investigate the extent to which NCEA exam fees disadvantage students from low decile schools.

Glossary

A Credit: The value assigned to a unit standard or achievement standard by the Qualifications Authority to reflect the relative time and effort required to complete the standards outcomes.

Standard: A Standard means either a unit standard or an achievement standard, or both, and is a nationally registered statement of learning outcomes, each of which describes a specific level of performance to be achieved in order for the learner to earn credits. Students in less traditional academic subjects usually earn unit standards, whilst achievement standards are gained in traditional academic subjects.

Year 11/12/13: Previously 5th/6th/7th forms. Now called Years 11, 12 and 13.

NZQA: The New Zealand Qualifications Authority. The organisation independent of the Ministry of Education responsible for overseeing and administering the Qualifications Framework and NCEA.

Decile: All New Zealand schools are ranked on a decile scale of one to ten. Deciles are a measure of the socio-economic level of the school community. Decile one indicates a school with a low-income community: decile ten indicates a wealthy catchment area. Some school funding is allocated on the basis of decile ranking in an attempt to provide for equity.

NCEA: National Certificate of Educational Achievement. It comprises qualifications at levels one, two and three. Students sat level one in 2002.

Background

The way that New Zealand secondary schools provide students with their national qualifications was dramatically changed in 2002. Instead of School Certificate, 6th Form Certificate and Bursary, students will now study for the National Certificate of Education Achievement (NCEA) at three levels. NCEA level 1 started for Year 11 students (fifth form) in 2002.

Like School Certificate and the other qualifications on the National Qualifications Framework, the New Zealand Qualifications Authority (NZQA) administers NCEA. NCEA has been developed as a way of assessing whether students have reached an established standard, at which time they gain credits towards their individual qualification.

The new framework provides a combination of internal assessment, and external exams. The internal assessment component enables schools to test a student's skills in areas, such as speech and performance, which are unable to be tested with pen and paper. The national standard is maintained through moderation of each school's assessment by a panel of NZQA experts.

The NCEA enables secondary school students to sit a wider variety of courses and gives schools more flexibility in assisting their students toward a qualification that best reflects their individual skills, abilities and preferences. Each student who reaches the set standard gains credit for their work. There is no scaling of NCEA results and, depending on the quality of their work, students are able to achieve the standard, or achieve with merit or excellence. Students can study a combination of NCEA levels, and a combination of achievement standards and unit standards at different levels. To achieve NCEA level one, students need to gain 80 credits. There is no set number of credits for any course. A student's record will display all the credits they have earned.

Introduction

With the introduction of the NCEA in 2002, a new system for setting fees for students was developed. This comprises an administration fee for each student, plus a fee for each block of points they select [Fig.1]. The Child Poverty Action Group (CPAG) was alerted to some possible problems with the level of NCEA fees by an education consultant working in many of the low decile, multi-cultural Auckland schools. Feedback she received through informal discussion with many teachers involved in fees collection indicated the NCEA fee structure had created new difficulties for poorer families, and for poorer schools, who have always found the collection of examination fees to be difficult. CPAG decided to fund a small investigative research project into it, and how the new NCEA fee and collection process was creating difficulties for low-income families and what suggestions schools would make to improve the system in the future.

Low-decile schools have always had problems collecting exam fees. Fees for national qualifications have always disadvantaged many students in these schools. Radical changes to the qualification framework, enabling a more individualised qualification system, has required the re-education of staff, students and parents as to why fees exist and why they are set at the level that they are. Low decile schools serve poorer communities that budget more on a week-to-week basis, where a \$100 invoice is significant, and difficult to fit into the weekly accounts. Because the system was new for all involved in 2002, teething problems exacerbated these existing difficulties for schools.

Objectives

To investigate the extent to which NCEA exam fees disadvantage students from low decile schools.

The following set of questions was used as a guideline by the researcher, during telephone interviews.

- Have you had any difficulties in collecting student's exam fees this year?
- Has the collection of fees this year, under the NCEA, been better, the same or worse than in previous years?
 - Why?
 - What are the differences?
- What have been the main problems that you have encountered?
- Which student's do you think have been the most disadvantaged?
- Do you have any actual data that we could use? e.g. % of students that did/did not pay their fees on time?
- Overall, can you make any comparisons with previous years?
- How would you like to see the system improved for your teachers, families and students?
- Did the exam fees dispensation for students whose parents are on social welfare benefits work, in practical terms, for your students?
 - What problems arose in this area?
 - How could this be improved?
- Can you think of one or two examples that stand out in your mind of students who were disadvantaged by the system this year?
- Is there anything else that you want to add?

Methodology

Telephone interviews were conducted with senior managers at low decile Auckland schools, whose responsibility it was to collect the exam fees in 2002. A set of questions was drafted by the researcher, and used to guide the interviews. The confidential interviews were taped with the permission of the interviewees.

The purpose of the interviews was to identify any difficulties they experienced in the collection process. Specifically, the interviews focused on whether the new system worked well for low decile students, whether it created new problems for such students, or if it exacerbated existing problems. This was followed by a general discussion of the way that each school organized fee collection in 2002, and plans for collection in 2003.

Selection of Schools in the Survey

A list of 16 schools in the Auckland region was compiled, including all decile one schools, several decile two and three schools, and one decile one area school. Faxes were sent out to each of the 16 schools requesting an interview with the staff member responsible for NCEA fees collection. Because this was done in the week before Christmas, it was very difficult to arrange times for interviews.

The final sample comprised eleven schools, eight Auckland decile one schools, one decile three school, one decile two school, and one decile one area school. The area school was included, in order to compare the issues that arose in larger inner city lower decile schools with those out of the city. Similarly, a decile two and three school were interviewed, to establish whether they experienced any of the difficulties, or whether the difficulties were unique to decile one schools.

Findings

Introduction

"I do like the NCEA system."

Initially it is very important to state that all of the schools interviewed were very supportive of the new NCEA system. This point cannot be stressed enough. Most interviewees requested that this be mentioned in the report.

I feel torn [talking about the problems] because I can see that NCEA is giving kids things that school certificate couldn't do, and so we, generally, here are supportive of the move to NCEA.

A number of the schools believed the flexibility of the new system which enabled a more individualised opportunity for students to gain a nationally recognised qualification was a success. The ability to combine achievement standards with unit standards, and the ability to select specific units in strong subject areas, whilst omitting other weaker areas, has meant some students that would have not previously completed a NZQA qualification are now able to do so.

Interviewees and their schools were very positive about the new system, and found their students to have picked up on it quickly and with enthusiasm. The schools experienced problems, however, and these fell into three categories. First, there were teething problems with implementation of a new system. Numerous administrative and technical difficulties occurred, both within the schools, and at NZQA. Secondly administrative problems were experienced by the schools because they are low decile and cater for students enrolled in a range of alternative courses. Finally there were financial problems experienced by students and their families in paying the fees, and issues involved in how the schools tried to help them.

The first category relates to the phasing in of the new system and will be less of an issue in 2003 and the future. The second and third categories, however, will remain problematic every year for low decile schools although measures could be taken by government to minimize those difficulties.

Coping with a new system

The collection of exam fees has always been difficult for low decile schools. The problems encountered this year are not new, but the NCEA has exacerbated them.

There are always difficulties in lower decile schools because exam fees are a lot of money, and people don't have spare money, so it's often difficult, even though you give them lots of warning.

In the past, schools have been able to predict the level of fees that will be charged, and prevent the problem of large surprise costs being faced by families. In 2002 schools were unable to confirm the level of fees until late in the school year, making it more difficult for them to help parents coordinate payments. Time is important in the collection of fees from poorer families. Schools need adequate preparation time to prepare parents early, and work with those who struggle to pay, whilst retaining their pride and keeping the household afloat. Communication with parents is more difficult than it is in wealthier communities, where often parents immediately write out a cheque for fees, regardless of its amount. Many hours of extra work were added to the workload of teachers in lower decile schools, however, sampled schools have learnt from the difficulties they encountered this year, and are developing strategies to mitigate these problems in 2002.

This Report

There are three main areas of feedback.

1. Teething problems with a new qualification.
2. Ongoing school administration problems.
3. Financial difficulties experienced by poor families.

1.0 Teething Problems with the NCEA

1.1 Different Schools used Different Methods

Each of the schools had their own individual difficulties with fee collection, and each adopted different methods of collection, based on the needs of their communities. Ideally, a payment of the entire sum was encouraged, but this is simply not possible for many families.

The two women taking the money – the executive officer and the accounts clerk – just worked flat out because, again, our students don't bring things in until the last minute.

The schools work closely with their community, and generally know the families that need extra assistance. They have each developed strategies, based on experience gained from previous years, to ease the problems created by a large payment near the end of the year on poorer families' budgets.

We've always offered time payment and administratively, that is very time consuming.

In 2002, some schools took a down payment from students, as a commitment that they would complete payment as they could afford it. The school covered the remainder of the fees. Others set up automatic payments for parents earlier in the year in order to drip-feed fees from a household's weekly budget, reducing the impact later in the year. Those schools that failed to begin fee collection early enough are already making plans to encourage their families to start paying earlier in 2003.

For next year, what we thought that we'd do, because we're a decile one school, is that we would start about March saying 'Okay, we want you to pay \$10 per week, and once your bill is announced, and once it's ratified, then we will either refund or claim the difference.

Many of the schools were required to pay the fees of their students, and then seek to recover the money at a later date. This was done so as not to incur the NZQA late penalty of \$200, and to ensure that students did not miss out on being able to sit their exams altogether. This was difficult to accommodate for many decile one schools. Some used scholarship funding to 'top-up' the fees of students who simply could not pay, or the schools sought support from their Board's of Trustees to cover the difference. Every possible avenue was explored to assist poorer students in being able to sit their exams. Most schools commented that their fee collection methods would be organized differently in 2003.

1.2 Computer Package

The Ministry of Education issued each school with a software package to keep a record of every student's programme, however, some schools did not receive their package until late in the year, and found themselves behind in administering the new system. Each school received a different software package, depending on the type of computers they used. Schools commented that the software provided was not ready for its desired use in 2002.

As each student enrolled in a particular unit, it was recorded on the computer system against their name. This information was kept throughout the year, and updated as courses were changed. It was then sent to NZQA to establish the level of fees for each student, the organisation of their examination booklets, and to keep an academic record of each student's progress throughout their time at school.

Collecting fees was a hell for me, but not so much getting the money in, it was the actual calculation on the computer software (Renaissance)"

Some schools required each individual subject teacher to input this data, whilst others had one or two skilled computer operators to oversee the data input. The data input process created many difficulties for the schools.

The fact that the MUSAC package that we were using and NZQA didn't marry was a nightmare.

We were continuing to download students' fees receipts, and that would corrupt our whole database.

We push a key and suddenly we've got every student in the school entering for Accounting 1.8.

It was important that the database be kept up to date, because it was common for students to change their course of study throughout the year. It was not uncommon for a teacher to change the course that they chose to teach during the school year also, requiring more alterations. In 2002, these student and staff generated changes created hours of extra work for teachers.

Because the information is sent to NZQA as baseline data establishing exam fees, it was vital that the data were entered comprehensively and accurately. Whilst teachers were trying to get their heads around the new courses that they were teaching, valuable time was exhausted on NCEA administration.

The problems that the schools experienced with the software packages they were supplied with included:

Problems associated with Data Input

In some schools a number of different people inputted data and mistakes in the use of the programme lead to large amounts of data being lost. Many teachers found the software confusing, and the level of individual computer skills varied significantly. Some staff showed an aversion to using the system, which they found confusing and time consuming.

There were lots of hiccups, and we weren't quite sure with lots of things, but overall, only one student, it appears, got a wrong printout, when History was left off his record.

The problem of individual errors due to multiple users was alleviated in a school that appointed one skilled operator, whose job it was to coordinate the data input process. By reducing the number of people using the system, the opportunity for user related errors was reduced.

I've heard from a lot of schools that the staff themselves were doing the input. That didn't happen here, one person did the input. It worked, and it was done in a condensed time.

While this provided a good solution to the problems other schools experienced, it required that school to fund an extra .5 salary from its operations grant.

Terminology

The new terminology used by the computer to describe subjects was ambiguous, complicated and unfamiliar to both teachers and students.

... they called mathematics a science, so I had an endless number of student's walking in here saying 'I'm not doing science'.

At this school, queues of students wishing to remove science from their fees receipt waited to talk to administrative staff, only to find that their printout was correct. More time was wasted explaining to students what the terminology on their printed course description actually meant as it was complicated and ambiguous.

I ran off the first bill and I took it to the Principal and he said 'Oh, this is a mistake. This student's doing five things and they're all the same.' I said 'Re-look at it, they're not the same'.

Support Services

Schools struggled to get adequate computer support, wasting a lot of time on the phone in attempts to solve problems that they encountered on a daily basis. It was difficult to find people who knew how to help troubleshoot the problems. This proved frustrating for the schools who were anxious to get the information correct and returned to NZQA before the final drawdown.

It was really late before we got it. I spent hours in the holidays working out which students were undercharged, and which students were overcharged.

When attempting to get support, the schools found that phone lines were often engaged for long periods and, when they finally got through, the support staff were themselves unfamiliar with the software, and ineffective in assisting.

I hope that it is easier next year, because it is not acceptable the way that it has been.

Some schools did not receive their computer package until late in the year, and found themselves behind in administering the new NCEA system. The computer programmes made administration very difficult. It is hoped that as familiarity with the system increases, both in the schools and at NZQA, problems will be minimized

However, levels of support and professional development must be increased if low decile schools are to successfully, accurately, and realistically, carry out the new administrative tasks required with the new software.

2.0 Ongoing School Administrative Problems

2.1 Parent Education

Many lower decile schools set up meetings with their parents to explain the new fees structure. The level of understanding about the NCEA is very low in the poorer communities.

I suspect the students and their families are a bit confused.

Some teachers felt they had to justify new costs because parents did not understand that an external body set the fees, and believed the money they paid would go directly to the school.

The fees part of it has been the biggest bugbear with NCEA because of the fact that it was new, and that it wasn't explained properly, in writing, by the Ministry.

In these situations, schools often found it difficult to justify the new costs, and even to understand the rationale themselves.

A flat fee for all students would be better. The staff find it very hard to understand [the increased cost], the student's were just blown away by the whole nightmare.

There is a real need to stress to parents the importance of examination fees in assisting with their children's education. Often families are large, and spending priorities are focused elsewhere. When families are struggling to make ends meet, there is often not enough money to stretch to "expensive" school fees.

The majority of our families don't see education as a [spending] priority, or if they do, they certainly don't show it.

The week that we collect fees is also White Sunday (an important religious celebration for many Pasifika families) here in South Auckland. Families see White Sunday as a priority, so paying for their school fees is a low priority.

Evening meetings were set up to explain the costs, and were often conducted in a variety of different languages. The meetings included the importance and availability of financial assistance, the nature and changes brought in to the qualification framework by the new NCEA system, information about fee deadlines, and question and answer sessions.

We have families that don't realise that a deadline is a deadline and just keep coming back and wanting to enter [their children in exams]. Whatever we do, there is trouble making our families understand.

Evening meetings created an extra burden on already stretched staff, at a busy time of the year. The level of parent awareness has risen as a result, but a clear breakdown of the pricing structure and a clarification to parents that it is a national fee, and not one that the school benefits from, would help parents understand a school's position.

Many teachers felt they too would like a clarification and justification of the fee increase, especially regarding the administration costs. This is because they have been made responsible for a great deal more of the administrative burden themselves without any compensation.

The issue of parent education will always be a problem because there is a constant influx of new families into the schools every year who will require educating on all aspects of the NCEA.

2.2 Greater Administrative Burden

“NCEA has created far more work.”

Because the NCEA qualification is a more flexible and individualised qualification, with each student selecting his or her own unique course of study from a wide range of options, a far greater administrative burden has been placed on teachers and support staff.

I remember one Friday I sat at my computer, probably started at 8 o'clock in the morning, with the students coming in in sixes and sevens all day long. I didn't have time to look at the clock, or have morning tea. I stopped about 1-ish and said 'I have to go to the toilet'.

Previously, blocks of students would all sit the same exams in the same year. Under the new system this does not as readily happen. Every student's programme must be entered into the computer system, and kept as a separate record.

There are a whole lot of extra things that you have to do.

Throughout the year, it was common for teachers to alter their teaching programmes, or for students to change the credits that they chose to sit. In 2002, each alteration had to be entered into the computer, often by the classroom teacher. Each time a new printout of a student's programme was completed, it was necessary for students to get their courses checked for accuracy. This was time consuming, and also necessitated the need for invoices to be checked.

The staff haven't got the time to check the bills.

They need to look at the whole billing system because it's very complicated. It's very difficult for a student to check it.

The number of different personnel using the software also led to problems (see 1.1 and 1.2). Teachers who had to input data found it time consuming; time which could have been better utilised by them as teachers.

We had nights 'til midnight.

The administrative load was hugely increased. In the past, where we'd have one person entering [the data], here we had three people doing it, just to save their sanity.

For a few days, we just worked flat out.

We had two weeks of nightmare.

The interviewees have identified this new administrative role for teachers as a key issue in lowering teacher morale and enthusiasm toward the new NCEA system as a whole.

The task of physically checking to make sure that the entries are correct in the first place is massive.

In order to get the administrative time [for NCEA], something else has to suffer.

2.3 Ongoing Fee Collection

Because fees of around \$100 are high for poorer families, many decile one schools created alternative methods of fee payment. Drip feeding fees in small payments, when the student or the household could afford it, were common across the schools interviewed.

Here, we fall over backwards to make sure that students don't miss out.

By requiring a down payment, in order to show a commitment to pay the fees, many schools found themselves acting as debt collection agencies, having to chase up fees right up until Christmas.

You have to keep labouring away at home. It's not like [a named high decile school], where you give them a bill and they pay it in the next week.

Boards of Trustees were asked to underwrite any outstanding fees, so that students' fees would be paid in time for them to remain eligible for exams,

without incurring the \$200 late penalty. This put pressure on school budgets which do not have spare resources to draw upon

The school did cover some students that they knew the family either couldn't, or wouldn't support [we have] always done this, and come out ahead, but this year, we are over \$3000 short.

I still have students coming in and giving me \$30, there are very few who will just go for the ride. Most want to do the right thing, but they're in really difficult situations.

These schools put in a great deal of work in order to help their students to pay fees. Letters reminding parents of important dates were followed up with phone calls, and further letters. The schools explored many avenues in an effort to help their poorer students to pay examination fees.

Those ones that I know are under hardship, in the end we try and fund ourselves. We've got money that comes in from The McKenzie Trust and we try and keep some of that.

Many schools plan to circumvent the difficulties experienced in 2002 by estimating NCEA fees for 2003, and starting to collect fees earlier in the year.

We intend to estimate NCEA fees for our parents and put an option to them at the beginning of the year to have automatic deductions until the bill is met.

2.4 Timing of NZQA Liaison

The timing involved was really condensed.

There were two key issues related to problems with timing. Firstly, schools were not able to successfully enter all their students eligible for financial assistance within the time frame required by the NZQA. The June 1 cut-off date was much earlier than the date by which the examination fees had to be paid. Because many parents in poorer communities budget week to week, the cut-off deadline did not register as important. This issue is dealt with in the section discussing access to financial assistance [3.2].

The second issue was the amount of time poorer families need to pay larger amounts of money. Drip fed payments are very common in lower decile schools to pay for a variety of things, including school uniforms, P.E gear and examination fees. In 2002, fees receipts were very late in arriving. Some schools were not able to let their parents know of the level of the fees until two weeks before they were due. This made it difficult for schools to collect money on time through this method of payment, as they were not able to forewarn parents of the level of their children's fees.

We had no way of calculating how much students owed, because the [computer] package does that for you.

It was really stressful this year, because of the time frame involved.

This problem may be remedied by schools next year, as they plan to collect money for fees over a longer period, starting earlier in the year. Due to the difficulties experienced this year, many have decided to send letters out at the start of the year warning of the fees, and encouraging parents to start paying early.

We have an internal deadline, which [the students] never meet, but that's a month in advance, because we know that there's going to have to be follow up, follow up, follow up.

Time frame, I think for payment, is probably the most important thing. We try and do our cut-off date really early so then we've got time to do the chase up.

It's my job to help people having trouble paying bills. I really encourage them to set up automatic payments. A lot of them who have struggled have said that this has just been a lifesaver for them.

This year, some of the schools were not able to let their parents know of the level of fees until two weeks before they were due.

3.0 Financial Difficulties for Poor Families

3.1 The Level of Fees

Fees are higher with NCEA

The Level 1 NCEA was substantially more expensive.

It is generally acknowledged that NCEA exams are more expensive than the fees charged for School Certificate, despite assurances from the Ministry of Education that this would not be the case.

They said that there'd be no substantial increase in fees, but there was substantial increase.

School Certificate cost each student \$75 for five papers. The NCEA cost students in these schools on average about \$109. For poorer families, a fee increase of \$30 has a great effect on their weekly budget.

There's a big mind gap between \$75 and over a hundred.

\$118 - \$131 for a full time programme for some families that was pretty tough.

Most of our students are doing between 95 and 125 credits, so they're paying quite a healthy sum.

Combining Unit and Achievement Standards

Students who chose courses that combined unit standards and achievement standards were required to pay administration fees for both. This type of programme selection, involving a mixture of standards, is more common for students doing less traditional academic subjects, and these alternative subject pathways are common in low decile schools.

It is more expensive because the achievement standards and unit standards are priced according to the amount of credits that you pick.

So in nearly every course in the school, the student's will be doing achievement standards and unit standards, which means that there is an administrative fee for each. If you're talking [two named decile ten schools], they would go purely with NCEA level one achievement standards, whereas we would be putting in lots of unit standards as well, because our students would be more likely to achieve them.

Lost achievement opportunities

Schools highlighted many cases of students who selected, changed or stopped their courses during the year in order to reduce costs.

Students were slower to bring in the money, because the amount of money they had to pay was constantly changing as they altered their entries.

In order to reduce the fees, some students removed credits they had enrolled in, if they thought they might fail the exam. Some schools assisted their students in this process in order to reduce the fees, yet still enable them to sit exams.

I had students coming to me the day before exams, or parents coming in and their student had been too frightened to ask the parents for money.

We had about twenty students withdrawing altogether from everything. They did have credits, but they did not pay the bill. Ten would have been leavers; the other half didn't [pay] because of the bill. That means that they will come back next year to do seventh form again, or sixth form again.

Students were coming into my office asking me to withdraw them from certain unit standards so that their bill would go down.

In some cases, the kids had got the credits, and they still wanted to wipe them out. That is one of the saddest things. I was so depressed that day when I walked out of here because so many students had come in to make me reduce their bills so that they could afford them.

The level of fees had a restrictive effect on the educational opportunities of poorer students, under a system that was designed to assist such students towards a national qualification. The price is, unfortunately, putting such a goal out of some students' reach.

An extra year of fees

With the introduction of NCEA for Year Twelve students in 2003, replacing Sixth Form Certificate in many secondary schools, there will be an added cost for families that have students in both forms next year. Previously, Year Twelve students have not been required to pay fees for external exams. This will be a new requirement from 2003. As a result, an increasing number of families will have an extra \$100 (approximately) added to their household exam fee bill next year.

Hopefully next year it will be easier, now that we've run through it once, but with level 2 next year, I don't see it's going to be any easier.

The fees structure

In order to be awarded NCEA level 1, students must achieve 80 credits. Students pay an initial administration fee of \$35, and are then charged an additional \$12 for each 25 credits that they attempt.

Therefore, to achieve the required 80 credits, students must pay for four credit blocks (4 x 25 = 100 credits), because three blocks (3 x 25 = 75) will leave them 5 points short of the certificate. In this way, they are forced to pay an extra \$12 for 25 points, only five of which are necessary.

It's a bit of a have, I think. They must register for a minimum of 100 credits, when they only need 80 for the certificate.

It's a bit of a cheat.

3.2 Access to Financial Assistance

Two avenues have been created for families in need to apply for financial assistance.

Financial assistance for beneficiaries

If a student sitting NCEA level 1, or their parent/guardian, receives a Work and Income Benefit as their main source of income, they are able to apply for a fees reduction. This entitles them to an exemption for all course fees. They pay only the administration fee. In order to be eligible for this, the school must submit a completed form to NZQA no later than June 1. [Fig.2]

A lot of our families were eligible for financial assistance, therefore, their fees ended up being only \$35.

This type of assistance was important to lower decile schools, as many of the families are beneficiaries. Financial assistance was used to differing levels of affect by the schools. Whilst they realised that financial assistance could help their communities significantly, they experienced difficulty in using it effectively.

WINZ were on the phone to me, constantly checking things.

I find that the forms don't get to parents.

The June 1 cut-off date was too early for the schools, who were unable to get the forms home to the parents, get them completed, and returned in enough time to send them to NZQA.

Because it's processed in June, the immediacy of that money and that payment means that, whilst over 50% of [our] students should be filling [the form] in, from a school of 900, we're lucky to get 40 – 50 in.

Whilst those who completed the form were usually eligible for assistance, many families missed the cut-off date and, therefore, became ineligible. Financial assistance provisions were designed to be able to alleviate the pressure created by exam fees on lower income families. In practice, it proved difficult for the schools to reach many within the timeframe.

Financial Hardship [non-beneficiaries]

Some students were able to apply for financial assistance in the case of financial hardship. They were eligible if the main source of household income was not a Work and Income Benefit, but deemed sufficiently low as to necessitate support. Like the Beneficiary form, this form had to be completed and returned to NZQA no later than June 1 2002. [Fig.3]. Similar difficulties were experienced in getting the information and forms to the people that they were designed to assist.

Next year, I'm going to give everyone, regardless, the form.

The early cut-off date meant that many families did not realise the significance of these forms, if they received them at all. This may change next year, as schools plan to send this information to their parents earlier in the year, and stress their importance.

The non-beneficiary form does not enquire as to the reason why hardship exists. It simply asks how many dependants each household has, and their overall household income. This created anomalies, and questions over eligibility.

We [had] one family where one sibling was granted assistance and one was not.

There were instances where families had more than one student required to pay exam fees, and this was not taken into account when assessing whether the household should receive financial assistance. The number of students from a household required to pay exam fees in any single year should be included as an important criterion in assessing whether financial assistance should be granted.

It is perceived by many of the staff, whose job it was to collect the fees in 2002, that the problem of multiple students from a single household required to pay fees will be accentuated from 2003 onwards with the introduction of fees for Year Twelve students.

One family have several students at our school, all of them who are very able. One of the boys is in the sixth form. He was charged \$119

NCEA. He has twin sisters in the fourth form, who were entered in NCEA Social Studies and NCEA maths, which cost \$59 each. They had another sister in the fifth form that was very bright, and was charged \$131 because the math's programme she was doing bumped her up to another 12 credits. That family is ten within the house. They have had huge financial problems this year. We know that there's no money in that family, so we end up having to pay for that. The boy is dribbling in about \$10 a week from his job, but most of his money has to go to support the household.

This issue of multiple students from the same household required to pay examination fees must be addressed. There is dissonance between the two systems (NCEA fees and the financial hardship funding), and large families are penalised as a result.

Many schools plan to meet with parents early in the 2003 to provide them all with the financial assistance forms directly, and emphasise their importance. Others plan to post the forms to parents, with a covering letter explaining the importance of returning them completed, before the cut-off date. These strategies, however, will not guarantee that all those who need the help will get it.

Case Studies

Staff gave the following examples of recent experiences in collecting fees:

We've had kids pick and choose what they enter, and that's often on a cost basis, or they'll say, 'I don't know if I've got a chance in English, so I won't enter that.

Student A was doing bursary subjects and so she wiped out all the unit standards so that she could reduce her bursary bill. It was very hard on the staff.

I remember one student, his English is so poor, and his science teacher was just so thrilled that he had achieved in some of his unit standards and achievement standards in science, but because he wanted his bill reduced, he threw out his credits.

Fees will be paid by an older sister or brother who is working, and that will come in on their payday, so it's creating a new set of pressures for the families.

There are a lot of families who simply don't have enough money. Maybe, before they could scrape it together, often now it's more difficult.

We've got a lot of Pacific students. These families are often unemployed, or in really low paying jobs, and it's being able to help them pay in ways that are other than a lump sum And that's really difficult, but you must understand that that adds hugely to our administrative load, because we often have to handwrite receipts, and keep tallies of what people owe.

There was a couple that had a bill of over \$200 which was hard.

There was one family of refugees, and the financial assistance message does not get home enough. When they were told earlier in the year, it just went over their heads.

The only positive story mentioned was the following:

Student A came from another school and we did not know if she'd paid her fees. In the end, social welfare paid for it. She was late, therefore incurring a \$200 penalty. Social Welfare paid that too.

Conclusions

Fees for national qualifications have always disadvantaged students from economically poor families. The fees for NCEA qualifications, however, have caused even greater problems for some low-decile schools, and their students, than was the case in previous years.

The professionals interviewed were delighted and relieved that we have a new system of qualifications in New Zealand that appears to meet the needs of students in lower decile schools better than the previous qualifications did. It is, therefore, ironic that in a country that provides “free education” to its compulsory sector, the NCEA exams fees have prevented some students from gaining the qualifications they have worked towards. This is especially concerning when the NCEA has the potential to assist these very students to achieve qualifications previously unavailable to them.

Recommendations

1. That there be no fee for examinations for the NCEA at all.

I think that they should be free.

As New Zealand students are entitled to a free education, it does not seem appropriate for them to pay any fees for their exams. All students benefit from the opportunity of sitting exams, as a means of completing a nationally recognised qualification. Therefore, the elimination of fees should be a priority for education spending. Whilst \$100 may not be a problem for wealthier families, it is proving difficult and sometimes prohibitive for poorer families. Fees elimination could be assessed on a decile related basis, but the question remains, "What is the justification in making students pay for a compulsory and integral aspect of their education?"

I would really like to see no exam fees.

2. That the level of fees is reduced for poor families.

The NCEA is substantially more expensive than exam fees in previous years. Whilst it is understood that under the new system, each student's exam booklet must be individually printed, the \$35 administration fee has been criticised, particularly because teachers find themselves carrying a greater administrative burden also.

Many poorer students have altered their programmes in order to lower their fees, and confusion has existed, as students do not understand why their fees differ to their peers. A flat fee has been suggested to mitigate these problems. A fee reduction is recommended, at least back into line with the previous levels, because higher fees disadvantage poorer students.

3. That schools, and low decile schools in particular, receive financial support to administer NCEA to relieve the administration burden on teachers.

That a .5 administrative position be funded for the schools. Each school could use the funding (probably decile related) to suit its own needs. This would enable the schools to have one person to oversee the input of data into the computer, who would liaise with the NZQA on all issues related with NCEA administration.

By reducing the number of people using the computer, the likelihood of computer related difficulties would be greatly reduced. The school interviewed that had one person coordinating all data entry, found the

fee collection process significantly easier than other schools. Coordinating the education of parents through the organisation of meetings could also be done by this person, as well as ensuring that those eligible for financial support receive and return the appropriate forms. The position would be responsible for collecting the fees, answering questions associated with student's programmes by the students themselves, queries from parents, assisting families in budgeting for the school fees, and coordinating the collection process.

NCEA caused a marked increase in the amount of administration required and, in 2002, classroom teachers and senior management absorbed the increase. This is not a sustainable situation, however, and financial assistance should be given to schools so that their teachers can concentrate on teaching.

A point five administrative staff member would be great whatever title that you give them – data entry person – so there's someone in the school, some time release.

4. That students are not financially penalised for doing combinations of unit and achievement standards.

Only one administration fee per student should be charged, regardless of whether a student is studying a combination of unit and achievement standards or otherwise.

I think just an overall fee would be better.

It's going to help our families if there's only one charge, and it's got to be affordable for our kids.

5. That the financial assistance programmes have timeframes and systems that fit the NCEA fees timeframe.

It is recommended that the last date for receiving financial assistance be moved later in the year. June 1 is too early for schools to provide adequate information to parents.

Maybe an August download as well as a June download for financial assistance.

It would also be helpful for the schools to receive information on fee levels for their students earlier than they did this year. It is difficult for low decile schools to gather the fees over a short period of time. Low-decile schools need at least a month, after the due date, in order to collect all the outstanding fees.

6. That the government do more to help schools educate parents, especially those in poorer communities.

Increased support is needed through written materials in the main Pasifika languages, T.V advertising and liaison funding for the schools to assist in the education of parents. Materials need to include the message that schools do not benefit financially from the fees.

7. That the fee invoices are easier to understand for both students and families.

Language used on the fee receipts should be more user friendly. At the moment, the programmes receipts received back from NZQA are difficult to read and understand.

Appendices

Figure 1. NCEA Schedule of Fees

Figure 2. Application Form for Financial Assistance – (Beneficiary)

Figure 3. Financial Assistance Application Form – (Non Beneficiary)

Figure 1.

NCEA Schedule of Fees

NCEA level 1	Administration fee plus fee per 25 credits	\$35 \$12
Sixth Form Certificate	1 - 4 subjects 5+ subjects	\$45 \$70
University Entrance, Bursaries and Scholarships	Administration fee plus fee per subject	\$45 \$28
Higher School Certificate only	Administration fee	\$30
National Qualifications Framework for Year 12 and 13 students	Registered on NQF	\$20
	Not registered on NQF	\$35

Source: NZQA website –

<http://www.nzqa.govt.nz/ncea/acrp/secondary/general/421.html>

Figure 2.

Figure 3.

Bibliography

NCEA Brochure. Produced for Parent information.

NZQA website. www.nzqa.govt.nz