

**OECD Review on Evaluation and Assessment Frameworks  
for Improving School Outcomes**

# **HUNGARY**

**Country Background Report**

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On behalf of the  
**Ministry of Education and Culture**

Compiled by Edit Sinka research fellow

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Country background report: Hungary

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In co-operation with the members of the Advisory Board:

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## List of acronyms

ÁSZ	State Audit Office
OH KMÉO	Educational Authority's Department of Assessment and Evaluation
OKA	Round Table for Education and Child Opportunities
OKÉV	National Public Education Evaluation and Examination Centre
OKM	National Assessment of Basic Competencies (NABC)
OKNT	National Council for Public Education
QMP	Quality Management Programme (of schools)
TÁMOP	Social Renewal Operational Programme (EU Structural Fund)

## **Executive Summary**

Over the past two decades, numerous elements and tools of a modern public education evaluation system have emerged in Hungary. The evaluation system itself boasts many facets and constituent elements, which evolved gradually over time to reach their current state. A major milestone in this evolutionary process took place in 1996, when the assessment and evaluation system was defined by the Public Education Act. A new article was incorporated in the Public Education Act, which defined the national assessment responsibilities in public education (and within that, the operation of the examination system and, generally speaking, the development of evaluation activities), the mode of national and regional level professional evaluation, as well as the scope of those engaged in these tasks.

Around 2000 a National Assessment of Basic Competencies system was established in Hungary. The most important goal of the National Assessment of Basic Competencies is the development of an evaluation culture (and its methodological background) in schools, and to provide feedback on the effectiveness of one's own professional work with a view to generating development processes. What primarily justifies this professionally is that the assessment covers the full scope of students in the specific grades. In Hungary schools have a comparatively large autonomy in organizing their own pedagogical activity. This assessment measures the developmental level of reading comprehension and mathematical literacy with respect to all students in a specific grade, and its advantage is that the assessment is conducted under standardised conditions in all of Hungary's primary and secondary schools.

The primary goal of the National Assessment of Basic Competencies introduced in 2001 is that, in the light of objective data, it provides as detailed and multi-faceted a picture of the effectiveness of schools as possible so that data on Hungary's schools are comparable, which thereby facilitates institutions' self-assessment and contributes to the completeness of external assessment. Based on centrally processed data, every school has the opportunity to analyse the performance of its students in comparison with national outcomes and indicators.

The Educational Authority, as part of its mandate for public education, sends the results of the national assessment and evaluation to every maintainer and is liable to warn the maintainer if, based on the results, it is required to take steps in any of the schools. Schools are required to use the results of the National Assessment of Basic Competencies and the manner of use must be laid down in the institution's QMP.

Standardised examinations are, on the other hand, conducive to the evaluation of the public education system. Such standardised exams include, commencing from the academic year 2004/05, the ordinary written secondary school leaving examination and the advanced level secondary school leaving examination. The new, two-tier secondary school leaving examination was introduced in 2005 after lengthy (nearly a decade long) preparation. Under the new system, students themselves can decide on whether they wish to sit for the advanced or the ordinary level secondary school leaving examination with respect to individual subjects. The secondary school leaving examination itself constitutes the basis of admission to institutions of higher education. The previously much-criticized university and college admission system thereby ceased to exist. Schools continue to be responsible for conducting ordinary level secondary school leaving examinations, however, standardisation of both the assignments and the correction keys ensures far greater objectivity than previously with respect to this type of examination, too. The advanced secondary school leaving examination is conducted by external state examination committees independent of schools.

The school assessment system comprises both schools' self-evaluation and external evaluation by the maintainer. The assessment of the professional work of public education institutions is the task of maintainers as stipulated in the Public Education Act, which also defines the range of tools that can be applied during in the course of such activities. In the Hungarian regulatory environment, much depends on how local governments can cope with their maintainer duties, and at what standard they perform the tasks related to school assessment. It is for this reason that the amendment of the Public Education Act in 2003 stipulates regular maintainer control (at least once in four years), which covers schools' financial management, the legality and efficiency of their operation and the effectiveness of education. The amendment of the Public Education Act, which has been in force since 2005, greatly added to the weight of maintainer assessment in that it requires maintainers to publish the results of the assessment of teaching institutions on their homepages. The content of internal evaluation was renewed in the middle of the 90's, when institutions had to assess their own activity to create their "pedagogical programmes" and to develop their own professional and educational profile.

Until recently, there was no central regulation governing teacher appraisal. In the past few years two major changes took place. On the one hand, the amendment to the Public Education Act stipulates that institutions' quality management programmes should include criteria related to teacher appraisal and also defines the rules of the appraisal procedure. This amendment was to be effected by the beginning of the 2009/10 academic year. Schools can freely determine the criteria of teacher appraisal. The criteria of appraisal can vary from institution to institution. On the other hand, the majority of teachers teaching in schools run by the state or a local government qualify as public employees. Their work is governed by the Act on Public Education and other legislations on education, for example by the decree regulating the operation of educational institutions.

The Public Education Act states that students' achievement must be regularly assessed in the form of marks, and declares the right of parents to regularly receive detailed information on the development, conduct and progress of their children. In view of this, and in order to motivate students, the majority of teachers use the means of formative assessment on a daily basis. The selection of assessment tools is the right of teachers within the limits set by the local curriculum of the school. There is no central requirement in this respect.

The conditions of promotion to a higher grade, the requirements and forms of student assessment – to test their knowledge –, and the requirements pertaining to the evaluation and rating of students' conduct and efforts are set out in the local curriculum of schools. There are no mandatory examinations in primary schools. The national assessment has no effect on students' progress and is not even suitable for such purpose. It is only the secondary school leaving examination that has real consequences, but due to its nature, it is associated with an exit point. One of the characteristics of the reform of the secondary school leaving examination was exactly that it abolished the entrance examination for admission to higher education.

All systems whose existence is prescribed by statutory provisions and which directly provide quantitative data on one or all participants of public education, i.e. students, schools and school maintainers, are classified into Hungarian public education's assessment systems. The goal of all these systems is to provide, separately and jointly, a more exact and detailed picture of the entire system of public education and its individual details to facilitate political

decision-making, diverse external evaluation systems and the stakeholders' self-assessment alike.

The system's fundamental components are:

- Public education information and statistical data provision system
- The secondary-level admission system and the related centralised written examination system
- The two-tier secondary school leaving examination system
- The pedagogical assessment and evaluation system
- Hungary's participation in international assessment and evaluation programmes
- The national pedagogical assessment and evaluation system

## Chapter 1: The school system

(1) In Hungary the first level of public education (See Annex A) is kindergarten, which has a dual function: it provides day care services for children, and – as part of its public education role – it prepares them for school. Traditionally the primary school has 8 grades. Nowadays primary school courses last 4 years or 6 years, after which pupils continue their education in another 8-year or 6-year secondary school of some type.

(2) Most pupils who plan to go on to higher education follow their secondary education in a secondary general school, which provides general education leading to what is known as the secondary school leaving examination. Secondary general schools offer four, six or eight-year courses and have diverse curricula. Another possibility is to enrol to a secondary vocational school. This school type combines general academic with vocational education where pupils take a secondary school leaving exam and obtain a vocational knowledge at the same time. Vocational school offers students three or four-year vocational-technical courses without secondary school leaving exams to take. Pupils usually choose this type of education to train for a specialisation in which to take a vocational examination.

(3) On 1 January 2009, Hungary had a population of 10,031,000. In the academic year 2008/2009 a total of 2,150,000 persons attended kindergarten, participated in formal school education, higher education and vocational training. Of this number, 1,931,000 went to kindergarten, attended full-time education and full-time training, with their ratio accounting for 88 per cent of the age 3-22 population (See Table 1). This ratio shows a steady upward trend, and is currently 15 per cent higher than in 1990. Children reach school age at six at the earliest and at eight at the latest, provided they have reached the stage of maturity required for entering school. Compulsory school attendance lasts until the end of the school year in which the student turns eighteen (sixteen in some special cases).

Table 1. Number of institutions and students

2008/2009	Kindergarten	Primary School	Vocational Training School	Special Vocational School*	Grammar School	Vocational Secondary School	Higher Educational Institutions
Number of Institutions	2 562	2 375	451	140	621	704	70
Number of Students	325 677	790 722	128 848	9 809	242 777	271 351	381 033
Number of Full-Time Students	325 677	788 639	123 865	9 785	203 602	236 518	242 928

\*: Special vocational programmes mean vocational school programmes delivered to students with special educational needs at ISCED 2, ISCED 3 levels.

Source: *Statistical Yearbook of Education*

(4) Fundamental goal of school education in Hungary is development of key competences. These competences are Communication in the Mother Tongue, Communication in Foreign Languages, Mathematical Competence, Competences in Natural Science, Digital



Competence, Learning to Learn, Social and Civic Competences, Sense of Initiatives and Entrepreneurship, Aesthetic and Artistic Awareness and Expression<sup>1</sup>.

(5) Decentralisation is one of the principal features of the Hungarian public educational administration. The roots of decentralisation go back to much earlier than the post 1990 era. A significant stage of the decentralization process, the Education Act of 1985 substantially bolstered the independence of institutions and – among others – abolished the state inspection of public education of the previous era. The division of administrative and decision-making responsibilities constitutes a complicated web. The administration of public education is characterised by integration into the general system of public administration as well as extensive local and institutional independence. The system of administration at the local level is fragmented: a large number of rather heterogeneous – with respect to their size, social and economic situation – municipalities exercise local authority. At the same time, the scope of local level decision making and local government responsibilities are quite extensive.

(6) Regulation of public education in Hungary is subject to the Constitution of the Republic of Hungary and to the Act on Public Education of 1993, that is, to legal regulations of the highest level. Whereas the former expounds a fundamental constitutional principle in the legal framework of the right to culture and education, the latter spells out how and under what conditions a school age child can participate in school education. The Act regulates the characteristic traits of the institutional system, the rights and responsibilities of those participating in education, the opportunities available to, and the limitations of administration by the state and school maintainer, and also addresses financing issues. The legislative level is followed by the government decree level, which includes, among others, the Hungarian National Core Curriculum, the secondary school leaving and professional examination regulations and standards, the structure and functioning of the information system of public education, and the financing regulations applicable to non-governmental school maintainers. Ministerial decrees, in turn, provide important, partly administrative and partly curricular frameworks for the everyday operation of institutions.

(7) In Hungary, local governments are responsible for providing public education. The obligation to provide does not, however, also constitute an obligation to maintain institutions. Although a settlement is responsible for providing primary school services for its primary school-age population, it is not required to do so by establishing or operating a primary school. Settlement municipalities can freely decide on the way of discharging their responsibilities: they can establish or maintain an institution, form an association, partner with other local governments or school maintainers. Additionally, local governments are also entitled to fulfil non-obligatory responsibilities, that is, for instance, they can maintain a secondary school even though, under the law, county and Budapest district local governments are only responsible for providing secondary school services. Hungary's settlement structure and the aforesaid regulation have created a state of affairs whereby a great majority of public education institutions is maintained by villages and small towns.

(8) While local governments are responsible for providing public education services, other participants likewise possess the opportunity thereof. Churches, foundations, state bodies (for example higher educational institutions) and private individuals can also maintain educational institutions. In the 2008/2009 academic year, 88 per cent of schools were maintained by local governments or the state, with only 8 per cent operating under the aegis of a church, 5 per

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<sup>1</sup> Based on National Core Curriculum, 2007

cent were maintained by a foundation, private individual, etc (See Table 2). Primary schools maintained by the local government or the state provide free education services. With regard to non-governmental schools, some charge tuition and some do not. The state pays a per student central grant to non-governmental and non-municipal school maintainers, albeit this does not, in every instance, cover the full cost of operating a school, meaning that the school maintainer itself must contribute thereto.

Table 2. Number of public education institutions by the type of maintainers

2009/2010 academic year	Total	Public				Church	Other (foundation, privat)
		local government of		central budgetary	together		
		settlement	county				
kindergartens	2498	2069	48	16	2133	139	226
primary schools	2322	1888	103	28	2019	194	109
vocational schools	452	205	101	8	314	25	113
special vocational schools	141	56	72	0	128	6	7
secondary general schools	623	295	95	17	407	104	112
secondary vocational schools	684	288	160	19	467	31	186

Source: *Statistical Yearbook of Education*

(9) The system of public education is comprised of institutions legally independent from their maintainers. They are professionally autonomous, and, in other regards, are subject to the decisions of their operators. Maintainer management entails extensive rights from founding an institution through setting its budget to legal oversight.

(10) The first level of public education is kindergarten, which provides formal education for children between the ages of 3-6 within the framework of full-time care. A child may enter kindergarten at the age of three, but kindergarten is compulsory only at the age of five. Starting from September in the year the child turns five, he/she must attend four hours of kindergarten classes daily. Children usually leave kindergarten at the age of six.

(11) The past two decades have witnessed, from multiple viewpoints, a major transformation in the Hungarian school structure. Whereas prior to 1990, primary school primary level (grades 1–4) and primary school lower secondary level (grades 5–8) (ISCED 1 and ISCED 2) education was conducted entirely within the framework of 8-grade primary schools, today it only applies to the majority of primary and lower secondary level education. Students usually commence their education in this type of school at the age of 6 and, provided their studies are uninterrupted, they leave school at the age of 14. In this type of school, education is divided into two major segments: the so-called primary level (ISCED1), which begins with grade one and continues until the end of grade four, and the lower secondary level (ISCED2), which begins in grade five and continues until the end of grade eight (ISCED2). The latter has, since the early-1990s, to some extent, overlapped with the institution system of secondary school education, i.e. with the six to eight grade grammar schools, which emerged at that time. These school types came into being as the result of grammar schools, which provide upper secondary level education, expanding downwards. These changes in the 1990s took place mostly spontaneously owing to the wider scope of movement of local stakeholders, as well as demographic, social, economic and labour market changes and the competition unfolding

among institutions in their wake. Legislative changes also contributed to this process of transformation.

(12) Admission to primary schools maintained by local governments is based on the schools' catchment area. Parents are entitled to choose schools freely, however, schools can only admit a student from outside their catchment area if they still have vacancies, as they cannot deny admission to students living in their catchment area. In Hungary, primary schools may not – with the exception of special arts and sports classes – make primary school admission contingent on entrance examinations. In the 2008/2009 academic year, 790,722 children studied in 3,363 primary schools. Among these, 3,050 schools educate fewer than five hundred children, and there are only six schools with more than one thousand students. The figures underscore that a majority of schools are small or medium-sized, which is co-related with the low level of territorial concentration, as well as the fact that most local governments strive to provide primary school education services locally, even in small settlements. At the same time, several analyses<sup>2</sup> have found that it is precisely this fragmented school system that is one of the impediments to effective public education in Hungary. To resolve this issue, Hungary's central government provides diverse, albeit mostly financial incentives to school maintainers to join forces in some way.

(13) In the current system of public education in Hungary, institutions of secondary education are essentially the equivalent of the upper secondary level (ISCED 3), in other words, the eight-grade primary school is mostly followed by a four-grade (9-12) secondary education. In special areas, such as, for example, bilingual education and in the case of schools undertaking certain language teaching and talent nurturing related responsibilities, education lasts for five instead of four years. The student population leaving primary school continue their studies following one of three trajectories: in grammar schools, the gateway to higher education, in vocational schools, which provide a vocational qualification, and in vocational secondary schools, which conclude with the secondary school leaving examination (more on this in Section 6.1.2.), but it also provides basic vocational training. During the 1990s, the choice of secondary schools was characterised by receding enrolment in vocational schools and increased enrolment in programmes leading to the secondary school leaving examination. By the 2008/2009 academic year, the ratio of students continuing their studies in secondary schools was 77 per cent: 41 per cent of primary school leavers go to vocational secondary schools, 36 per cent to grammar schools, and 23 per cent to vocational schools (See Table 3).

Table 3. Number of students\* by the type of maintainers

2009/2010 academic year	Total	Public				Church	Other (foundation, private)
		local government of		central budgetary	together		
		settlement	county				
kindergartens	328545	305331	901	2130	308362	11614	8569
primary schools	773706	688879	11237	11199	711315	48565	13826
vocational schools	128674	70431	35245	2385	108061	4168	16445
special vocational schools	9968	4300	5092	0	9392	176	400
secondary general schools	201208	114885	30123	7574	152582	35413	13214
secondary vocational schools	242004	121117	70530	7549	199196	5689	37119

\*: in full-time education

Source: *Statistical Yearbook of Education*

<sup>2</sup> See for example: *Jelentés, 2006*

(14) In Hungary’s public education system, the school year commences on 1 September and ends on 15 June and comprises 183 teaching days. The academic year in schools comprises five-day teaching weeks, with the majority of schools holding classes in the morning hours (usually between 8 a.m. and 2 p.m.). An exception therefore is the so-called “school home” model where work (after lunch) extends into the afternoon hours, ending at around 4 p.m. Hungary’s Public Education Act sets the maximum daily compulsory classes for students. Additionally, schools can also organise elective classes based on students’ interests and needs, however, the availability of this option is limited.

(15) The curricula and academic requirements of each school grade are built upon one another, with the Hungarian National Core Curriculum providing the substantive unity of teaching and compatibility among schools. There are several classes in each grade and it is also possible to set up groups within the classes. The school headmaster decides on class and group divisions. The Public Education Act regulates the maximum and recommended class and group sizes (See Table 4). The limit regarding the number of students is the more significant of the two, since the law only permits narrowly defined exceptions thereto.

Table 4. Regulation of class size

	Recommended Class Size	Maximum Class Size
Grades 1-4	21	26
Grades 5-8	23	30
Grades 9-13	28	35

(16) Hungary has a mixed system of regulating the content of education<sup>3</sup>: on the one hand, it relies on a highly flexible tool of input regulation (National Core Curriculum), and on the other hand, it applies the system of output evaluation (secondary school leaving examination). The National Core Curriculum defines the development tasks by the end of grades 4, 6, 8 and 12 of public education, but it does not set forth detailed requirements or cultural standards. Several accredited frame curricula have been developed for each school type and they offer coherent curricular alternatives, it means the second level. The third level of content regulation is the pedagogical programme and local curriculum of each school.

(17) The tasks of the minister related to the evaluation of public education are the follows:

- establish, operate, develop and modernise the national system of examinations
- order national and regional assessment and evaluation tasks yearly and provide the necessary conditions
- operates the information system of public education

Most of the tasks is assigned directly to the Educational Authority (see paragraph 23) by the law.

<sup>3</sup> See more: Education in Hungary 2006, <http://www.ofi.hu/education-in-hungary-090617-7>

## Chapter 2: The framework for evaluation and assessment

(18) Over the past two decades, numerous elements and tools of a modern public education evaluation system have emerged in Hungary. The evaluation system itself boasts many facets and constituent elements, which evolved gradually over time to reach their current state. A major milestone in this evolutionary process took place in 1996, when the assessment and evaluation system was defined by the Public Education Act. A new article was incorporated in the Public Education Act, which defined the national assessment responsibilities in public education (and within that, the operation of the examination system and, generally speaking, the development of evaluation activities), the mode of national and regional level professional evaluation, as well as the scope of those engaged in these tasks.

(19) Between 2000 and 2010, an attempt was made to prepare a complex summary, in a single document, of the evaluation system of the Hungarian public education system. In 2005, the Minister for Education commissioned the preparation of an evaluation strategy, and a broad-based team of experts was engaged to work on the project entitled “The Establishment of a Unified Public Education Quality (School Evaluation and Student Performance Assessment) Evaluation System”. The document was completed in June 2006, however, it was not officially adopted. The Ministry for Education did not formally regard it as its own strategic document, although, occasionally it informally guided governmental actions. Nonetheless, the completed strategy proposal was finally published, the document is accessible<sup>4</sup> and, from time to time, reference is made to it in professional discussions. For instance, the strategy paper informally influenced the drafting of the comprehensive quality development programme planned with EU structural fund financing (TÁMOP<sup>5</sup> 3.1.8 program, see under Chapter 3.)

(20) Orientation towards evaluation is gaining more and more ground in the political arena as well as among the members of the teaching profession, and diverse evaluation instruments are bolstered, one after the other, through the legislative process. The government itself oversees and in part evaluates the discharging of public duties, primarily via the State Audit Office of Hungary, which also investigates public education, primarily local governments maintaining schools. The past few years have also witnessed the steady incorporation of elements of a modern orientation towards evaluation into the State Audit Office’s investigative methods (such as auditing performance).

The Hungarian language does not distinguish between the concepts of Evaluation, Assessment and Appraisal. No distinction is made between these three notions, they can only be distinguished by circumscribing them. Accordingly, in colloquial Hungarian and in the professional terminology alike, these expressions are used in conjunction with the subject of evaluation; i.e. the expression is associated with the subject of the evaluation: teacher appraisal, student assessment, or, say, system evaluation.

<sup>4</sup> “Egységes közoktatási minőségértékelési (intézményértékelési és tanulói teljesítménymérési) rendszer kialakítása [The Establishment of Unified Public Education Quality (Institution Evaluation and Student Performance Assessment) Evaluation System]”:

([http://www.allamreform.hu/letoltheto/oktatas/hazai/Minosegertekeles\\_vegso\\_OPEK\\_junius.pdf](http://www.allamreform.hu/letoltheto/oktatas/hazai/Minosegertekeles_vegso_OPEK_junius.pdf))

<sup>5</sup> TÁMOP: Social Renewal Operational Programme, one of the documents of the New Hungary Development Plan determining the utilisation of the European Structural Funds. The goal of TÁMOP grants is to expand employment, develop human resources, and to reduce labour market and social discrimination.

## 2.1 Current approach

(21) It is a characteristic trait of the Hungarian public education system that a complicated division of labour and a compelling necessity to co-operate have evolved amongst service providers, recipients of services and those responsible for service provision. The Hungarian state bears fundamental responsibility for operating the system of public education. The state provides for the co-ordinated functioning of the institution system of public education, for the co-ordination of service provision therein, and the co-ordination of oversight responsibilities. Responsibilities arising from the state's obligation are, in the domain of sectoral administration, the responsibility of the cabinet minister in charge of education. Operating the individual institutions and providing the conditions necessary for operation are the responsibility of the institutions' maintainers. The maintainers' responsibility also extends to the professional, efficient and lawful maintenance of the institution. The planning and organisation of educational and teaching work, developing children's and students' abilities and personalities, and expanding their knowledge is the responsibility of the institutions (kindergartens, schools and dormitories).

(22) Indicative of the significance and the degree to which evaluation has become institutionalised is that today evaluation responsibilities have by and large been legally codified. This took place incrementally over the past decade, most recently it was in fact, teacher appraisal which was incorporated into legal statutes governing public education. Likewise indicative of the extensive institutionalisation and significance of evaluation is that in 1990 the government established a new institution in charge of evaluation responsibilities.<sup>6</sup> The *National Public Education Evaluation and Examination Centre (OKÉV)* came into being as a central public administration body, its primary responsibility is to organise professional monitoring and evaluation in line with the minister's instructions. (A more detailed presentation of the institution will follow in Section 4.1.2.) This institution provides the infrastructure for conducting a national survey covering every student, however, its designated sphere of responsibility and authority is far broader than this, possessing as it does diverse means of ensuring the quality and effectiveness of education. Owing to the major restructuring of the Ministry's "background institutions" in 2006, OKÉV became part of the newly established Educational Authority with substantially expanded responsibilities.

(23) The Educational Authority is a regionally organized central office, which, besides a Budapest-based Directorate-General, comprises seven regional directorates. The institution is responsible for conducting national surveys and evaluations, organising state examinations and national competitions, and also serves as the national examination centre. It wields coordinative responsibility for the Minister's oversight and evaluation activity, and at the same time it also bears responsibility for regulatory oversight with respect to public education institutions. Its duties include managing the so-called expert list, to be discussed in greater detail below, and, further, discharging duties connected with the statistical system of public education and certain regional development responsibilities. It also has official authority to act when infractions are committed, and thus it boasts a rather wide range of responsibilities.

(24) The division of evaluation responsibilities, the duties of sectoral authorities, maintainers and educational institutions are set forth under the Public Education Act. Individual

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<sup>6</sup> Government Decree 105/1999. (VII. 6.) . on the National Public Education Evaluation and Examination Centre

stakeholders' responsibilities fit into the general system of educational administration, which is largely based on the subsidiarity principle: the system is characterised by strong institutional and school maintainer autonomy and a central administration with limited scope of movement. Of the previously mentioned three levels, the state level is detailed at greatest length, albeit this could also be misleading, since in reality the authority of the Minister of Education with respect to the evaluation of individual institutions is quite limited. The Minister's responsibility extends far more to establishing the conditions (regulation, financing, development) of school evaluation. The Minister of Education is obliged, under the Public Education Act, to evaluate the documents underpinning the regulation of the content of public education regularly (the National Hungarian Core Programme for Kindergarten Education and the National Core Curriculum), but at least in every five years, and has look after the monitoring and evaluation of pedagogical work conducted at educational institutions with the participation of the Educational Authority discharging its public education responsibilities. The Minister himself/herself may call for national and regional professional monitoring, the conducting of pedagogical-professional surveys, audits, analyses, and, further, may request the school maintainer to commission professional monitoring, pedagogical-professional surveys, audits and analyses at the educational institution it maintains, and to report the findings thereof to the Ministry. If the school maintainer fails to comply with the request, the Educational Authority may, upon the instruction of the Minister of Education, carry out the requested investigation.

(25) Of the Minister's responsibilities, the national evaluation tasks also constitute designated items under the Public Education Act, and, since 1996, when they were incorporated into the education act, these tasks have been continuously expanded. Designated separately among these tasks is the operation and co-ordination of the national examination system, the definition and review of the secondary school leaving examination, the development and modernisation of the national examination system, and the development of evaluation activities. Likewise set forth in the Public Education Act is that it is within the framework of national evaluation responsibilities that pedagogical activities, particularly the development of basic skills and abilities, conducted in educational institutions must regularly be measured and evaluated. The Public Education Act also provides that, in every academic year, assessment in grades four, six, eight and ten of the public education system must, for all students, include the testing of the development of their literacy in Hungarian language and literature and mathematics.

(26) At the second, medium level of public education administration, the law stipulates that school maintainers evaluate the fulfilment of the responsibilities spelled out in the institutional level "pedagogical programme" and the effectiveness of the pedagogical-professional work of educational institutions. There is no rule, however, on the professional criteria this evaluation must comply with. If the local government is the school maintainer, the evaluation is to be performed on the basis of a document (Local Council Quality Management Program, see Chapter 5.). Independent school maintainers are not, however, subject to any rules whatsoever. Under the law, the school maintainer can conduct this evaluation in a number of ways: it may use external assessment results, expert opinions, secondary school leaving examination results, reports compiled by the institution, or even the school board's opinion. The school maintainer must also publish the completed evaluation, either on its website or as customary locally (for example, in the local government newsletter or the bulletin board).

(27) The least regulated level is individual institutions' internal evaluation activity, even though both the Public Education Act and ministerial decrees stipulate limits with respect to the operation of institutions. Widespread traditional methods of intra-institution evaluation have been associated with the periodical reporting obligations of institutions and school leaders (typically due at the time when a school leader's generally five-year managerial mandate expires). Change has taken place in recent years, namely with the 2006 amendment of the Public Education Act. In consequence, a full-scale institutional self-evaluation, the period and methods thereof, as well as its correlation with the school maintainer's quality management system became a mandatory element in the institutional quality management programme which was, as of 2002, to be established at every institution. It stipulated, on the one hand, that in the course of implementing the institutional quality management program, the results of national surveys and evaluations be taken into account, and, on the other, that consideration be made for the criteria of the performance evaluation of those employed in teaching positions and for the rules of evaluation. Additionally, institutions have to evaluate the implementation of the quality management programme in every two years, and, based on this evaluation, they have to develop measures to ensure the convergence of the institution's professional goals, operation and the related results.

(28) Besides the means of evaluation set forth in the various rules of law there are additional mechanisms and means, which, in some countries, comprise elements of the evaluation system and are also in place in Hungary. First, we must make mention of the use of indicators established in international practice and the participation in international. Since 1996, Hungary has delegated members to OECD's INES work groups – who are involved in indicator development, data collection, and, occasionally, conceptualising and co-ordinating international research – and, as early as in 1968, the country joined IEA's international surveys. Currently, Hungary is participating in three international student assessment projects: the TIMSS international assessment, which commenced in 1995, the PIRLS international assessment which was launched in 2001, and the PISA international assessments, which were first organised in 2000 by OECD. Additionally, Hungary participates in other international studies involving public education, for instance in the OECD TALIS survey (see more about assessments in Section 3.1.2.)

(29) Around 2000 a National Assessment of Basic Competencies (NABC) system was established in Hungary (more details in Chapters 3, 4, and 6). The most important goal of the National Assessment of Basic Competencies is the development of an evaluation culture (and its methodological background) in schools, and to provide feedback on the effectiveness of one's own professional work with a view to generating development processes. What primarily justifies this professionally is that the assessment covers the full scope of students in the specific grades. It has already been mentioned in the introductory chapter that in Hungary schools have a comparatively large autonomy in organizing their own pedagogical activity. This assessment measures the developmental level of reading comprehension and mathematical literacy with respect to all students in a specific grade, and its advantage is that the assessment is conducted under standardised conditions in all of Hungary's primary and secondary schools. Based on centrally processed data, every school has the opportunity to analyse the performance of its students in comparison with national outcomes and indicators. Nonetheless, numerous institutions still grapple with challenges in this area (see Chapter 5 for details).

(30) A further advantage of the National Assessment of Basic Competencies is that it is not only suitable for analyses on a national level, but that inferences can also be made therefrom



regarding the county, local and school levels. Its greatest impact is that it paves the way for all schools to analyse their own institution's student performance, and to evaluate this performance in comparison with nationally emerging results and indicators based on centrally processed data. The institutions must, however, in the wake of diagnosing their own situation, be able to design and implement their measures. The assessment, among the national instruments serving the improvement of the quality of public education and the development of substantive, pedagogical work, could be one of the most effective measures if institutions and individual teachers were able to use it in the appropriate manner. As has been said before, the National Assessment of Basic Competencies also facilitates this by providing a technology (software) to schools for processing the results, through which teachers can perform local level evaluation of the results broken down even by assignment and class, can also analyse their own students' performance individually, and can compare the performance of their students with that of others.

(31) The 2006 amendment of the Public Education Act introduced a provision into the law stipulating that the National Assessment of Basic Competencies data are public (both nationally aggregated data and data on individual institutions). Although this measure, under the law, became valid for the first time only with respect to the assessments of the 2008/2009 academic year, which were made public in 2010, the Educational Authority has already made available the institution-level reports of the assessment conducted in May 2007 on the Internet.

(32) The team of professionals exercising professional oversight and conducting the National Assessment of Basic Competencies (Department of Assessment and Evaluation of the Educational Authority) would like to make the possibility of utilising the competence assessment results known and available in as broad a circle as possible, therefore on its website<sup>7</sup> the team has posted previous years' test sheets and correction keys, sample analyses, findings as well as national, school maintainer and institution reports.

(33) The public education system has an extensive professional service network. The so-called expert system was first established by the Public Education Act of 1993, and it is the education administration's ongoing responsibility to coordinate the entry of experts (tantamount to state recognition or accreditation) to the National List of Experts. A ministerial decree<sup>8</sup> governs the National List of Experts and expert activity, and the expert list contains experts entitled to participate in the professional evaluation of an educational institution broken down by specialised areas. Entry to the list is for an indefinite term, however, experts on the list must participate in further education in at least every five years. Additionally, they must also attend further training in the field of law. In charge of the list of experts, the Educational Authority launched an electronic system in 2010 which not only assists with administration, but allows everyone to search the system via the Internet, and thus experts can receive assignments this way. The Educational Authority is entitled to assess the activity of experts, either on a case-by-case basis or regularly. Hammering out standards for expert activity is, however, yet to be accomplished. The functioning of the list of experts, during the past decade, allowed clients to find experts for their specific jobs in large numbers. A significant ratio of public education experts perform their work as independent entrepreneurs on the basis of contracts with school maintainers.

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<sup>7</sup> <http://www.oh.gov.hu/kozoktatas/korabbi-meresek/korabbi-meresek>

<sup>8</sup> Decree No. 38/2009. (XII. 29.) OKM of the Ministry of Education and Culture on the Conditions of Public Education Expert Activity and the Appointment of the Chair of the Secondary School Leaving Examination

(34) Standardised examinations are, on the other hand, conducive to the evaluation of the public education system. Such standardised exams include, commencing from the academic year 2004/05, the ordinary written secondary school leaving examination and the advanced level secondary school leaving examination. The new, two-tier secondary school leaving examination was introduced in 2005 after lengthy (nearly a decade long) preparation. Under the new system, students themselves can decide on whether they wish to sit for the advanced or the ordinary level secondary school leaving examination with respect to individual subjects. The secondary school leaving examination itself constitutes the basis of admission to institutions of higher education. The previously much-criticized university and college admission system thereby ceased to exist. Schools continue to be responsible for conducting ordinary level secondary school leaving examinations, however, standardisation of both the assignments and the correction keys ensures far greater objectivity than previously with respect to this type of examination, too. The advanced secondary school leaving examination is conducted by external state examination committees independent of schools. (See also 6.1.2)

(35) As of 1996, Hungary joined the OECD's international indicator programme and has from the beginnings participated in the establishment of the European Union's educational indicator system. Education research, too, makes an outstandingly significant contribution to the evaluation of Hungarian education. In this regard, previously the most important document, published at three-year intervals since 1996 by Hungary's National Institute for Public Education – reorganised after 2006 – was the volume entitled "Report on Hungarian Public Education". The box below is illustrative of the rich content of these publications.

*Education in Hungary 2006*

Foreword

Introduction – Hungarian public education between 2002 and 2006

1. The socio-economic environment of education
2. Public education administration
3. Financing public education
4. The educational system and the progression of students
5. The content of education
6. The internal world of schools
7. Teachers
8. The quality and effectiveness of public education
9. Inequalities and special needs in education

Appendix Tables and other items

References

Databases

List of diagrams and tables

List of abbreviations

## **2.2 Context**

(36) Besides the Minister's sectoral oversight activity, educational institutions are likewise subject to the authority of the legal inspection system of general public administration, with the State Audit Office (ÁSZ) investigating compliance with the rules of law also governing the utilisation of public monies in educational institutions on a regular basis. In the majority of cases, reports by ÁSZ point beyond a simple financial audit, which is an indication that with respect to the educational system there exists a kind of external appraisal as well, one conducted by stakeholders outside the system. In the nearly 160-page document entitled "Report on the Monitoring of the Utilisation of Financial Instruments Allotted to the Financing of Public Education Responsibilities under the Chapter 'Ministry for Education and Culture' ", for instance, the auditors also wrote about the effectiveness of education. The report also reveals the type of factors based on which the effectiveness of an individual school is assessed: "Indicative of the effectiveness of school education and educators are outstanding academic averages, top performances at national competitions, the number of students passing the secondary school leaving examination and foreign language proficiency examinations and the number of those continuing their studies in higher education."

(37) By the 2000s, quality, effectiveness and accountability became the most frequently used expressions in Hungary with respect to public services. The international environment had probably influenced this, and, in all likelihood, the unfavourable economic situation in which Hungary found itself was also a factor behind this. Besides education, healthcare was another major area where this set of problems surfaced not only in the domain of public policy, but also on the level of daily public debate.

(38) Evaluation is an area affected by numerous politically sensitive factors. At the same time, in an interview a well-known Hungarian expert of the field put it as follows: "As in all countries, naturally in Hungary, too, the realm of evaluation is accompanied by the most diverse conflicts of interest, which occasionally lead to controversy that spills into politics. Overall, however, it could be said that evaluation cannot be regarded as an overly politicised area, where political disputes and conflicts would impede the functioning and development of the system."<sup>9</sup>

(39) The transparency of spending public monies and the issue of data of public interest have surfaced in Hungary as well over the past few years with regard to the publicity of competency assessment outcomes aggregated at the institutional level. The opinion of one of the sides was that data from assessment conducted with public funding must be made public, moreover, everyone is entitled to know the performance of schools financed by public funding. The other side, while not disputing this, nonetheless, formulated its doubts as to whether the National Assessment of Basic Competencies really produced solid data of the kind that can be used or is ethical to be used for these purposes. Frequent criticism and contrary opinions have been voiced often and by many sides with respect to data utilisation, but, ultimately, today the data are entirely public and no specific public criticism has arisen.

(40) The issue of the utilisation of assessment data has also surfaced as part of public debate. We find the following in the publication concluding the work of the Round Table for Education and Child Opportunities (see Section 2.3.)<sup>10</sup>: "The practical purpose of standards-based testing and the information it provides have been subject to a great deal of confusion. The assessment and evaluation system regularly gives rise to misunderstandings in

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<sup>9</sup> Communication with Gábor Halász.

<sup>10</sup> Green Book for the Renewal of Public Education in Hungary (for bibliographical reference data, see References section.)

Parliamentary debates of the Public Education Act, in the Parliamentary Education Committee and in the education working groups of political parties. The diagnostic assessments designed for the individual levels of educational intervention are regularly confused with summative assessments, which are designed to evaluate schools and are not intended as a reference for individual level intervention. Law making processes in relation to the assessment and evaluation system are characterised by impatience and unjustified activism. Even though the Hungarian system is not yet sufficiently established and its experiences have not been properly discussed, policy makers bring forward a flow of ad hoc proposals on the fastest possible means of converting test results into school evaluations and on methods of penalising low-performing schools.”

(41) Characteristic of the stakeholders concerned in Hungary is that they communicate much more in areas closely bound up with everyday life, or are mainly provided opportunities to do so in the press. Currently, the issue of grade retention is a topic of debate because a few years ago the liberal educational administration abolished or rendered grade retention in the first four grades of primary school extremely difficult. Its justification was that children of this age develop at a rather different pace and some among them simply need more time to catch up and it would be a shame not to promote them to the next grade. Another argument contributing to this was that some students come to school education with disadvantages they are unable to overcome within a year or two, but if they were given four years to comply with academic requirements, they would have better prospects. By now, one or two grades of students have completed the first four grades under this scheme, with no grade retention, and there is ample media coverage of the topic, with parliamentary political parties, education experts and teachers’ unions being especially proactive regarding the issue.

(42) The predominant form of school evaluation is the one conducted by local governments and, generally speaking, the school maintainers’ dominant role in this area is an important feature of the Hungarian system. The state does not really conduct such evaluations independent of local governments, only within a very limited framework. During the debate of the already mentioned quality assessment strategy,<sup>11</sup> one highlighted issue was whether the state should conduct school evaluation independent of local governments, “over their heads.” The strategy and the Social Renewal Operational Programme’s (TÁMOP) plan likewise insisted that only maintainers should perform school evaluation, which some experts disapproved of. They proposed that a component be incorporated into TÁMOP within the framework of which the central government would prepare sample evaluations based on high professional standards completely independent of the maintainer. These could also have contributed to increasing the quality of evaluation. The following arguments were brought up against this option: it is difficult to integrate it into the current regulatory order, and, on the other hand, it is also hard to reconcile it with the currently existing local government autonomy. This is a politically sensitive matter involving the relationship between local and central governments. Probably, however, besides politics, the paucity of resources (financial and human) also contributed to the fact that such evaluations have not been implemented. It is, however, worth realising that local governments’ ambivalent reactions are not helping the process, either. On the one hand, they decry interference, on the other hand, they complain about not receiving any help for performing a professional job which requires a great degree of special expertise they do not possess.

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<sup>11</sup> Gábor Halász’s recollection.

### ***2.3 Initiatives and implementation***

(43) In spring 2007, Hungary's Prime Minister established the Round Table for Education and Child Opportunities (OKA). (Simultaneously, the Prime Minister also initiated two other round tables, the Pension and Old Age Round Table and the Competitiveness Round Table. This clearly sheds light on the areas grappling with major problems in Hungary in the early-2000s.). The goal of OKA was to promote the emergence of consensus with respect to issues of outstanding importance affecting society as a whole both in the short and long term, and to initiate, in the broadest possible circle, the preparation and discussion of analyses which would give rise to recommendations in order to effectively facilitate the work of the prevailing government and the legislative process. OKA members were delegated by the Prime Minister, the competent parliamentary committees, the Hungarian Academy of Sciences, the Economic and Social Council, scientific and professional organisations, trade unions, business chambers, and Hungary's historical churches.

(44) Members of OKA prepared investigative studies, analyses and recommendations in 12 subject groups. One of these subjects was Measurement-Evaluation-Accountability. The recommendation package took its final form in the studies of the *Green Book for the Renewal of Public Education in Hungary*, the manuscript of which was discussed and approved by a majority vote of the Round Table for Education in June 2008. The Green Book's recommendations perceptibly impact the way those involved shape their opinion. The project formulated the following important conclusions with respect to evaluation:

- Comprehensive performance measurements are extremely important. No resources are available to create the professional expertise required for interpreting the results, thus this information is barely utilised.
- The data of international surveys are not adequately analysed. It is not enough to perform assessments, the same amount of money ought to be spent on conducting partial analyses and on utilising the results.

(45) Besides OKA, another body with a similar purpose operated in the recent past: the "Committee of Wise Men" established by the President of Hungary. This body aimed to foster agreement between social actors, and facilitated longer-term planning. Experts compiled studies in two areas, on the subjects of education and corruption. However, they did not draft recommendations aimed at specific government measures, but, based on the analysis of the situation and the uncovering of correlations, they defined values, principles, guidelines and tasks. This Committee published the results of its work in the beginning of 2010 in a book entitled "*Wings and Weights. Proposals for rebuilding the education system of Hungary and combating corruption*". This material is so new that it is not yet possible to analyse either reactions or possible impacts.

(46) Implementation of the national assessment responsibilities of public education is facilitated by the Council for the Evaluation of Public Education which is an advisory body of the Minister for Education and Culture. This body, which has functioned more or less regularly since 2004 – for the time with no higher level legal background – also plays a role in interest reconciliation, particularly by providing politics-free academic foundations for preparing decisions. The chairman and five members of the Council for the Evaluation of Public Education are invited by the Minister of Education and Culture from among the ranks of nationally and internationally renowned experts with academic, research, development,

educational and practical experience in the areas of evaluation of teacher effectiveness, measurement theory, data collection and data analysis, content framework development and the management of evaluation programmes. The National Public Education Council, the Public Education Policy Council and the National Minority committee may each delegate a member to the Council for the Evaluation of Public Education. The Council for the Evaluation of Public Education is responsible for submitting proposals to the Minister of Education and Culture for the development trends of the assessment and evaluation system of public education, thus specifically for determining the contextual framework of national assessment and evaluation, for laying down the academic foundations of the definition of ability levels and for Hungary's participation in international student performance studies.

(47) Of the stakeholders involved, it is, generally speaking, the hardest to learn about the views of the population on evaluation. It does not make things easier that they are the least able to represent themselves in bodies established to ensure the communication of a common platform of divergent interests. In Hungary, however, it is a regular feature of the aforementioned "Report on Hungarian Public Education" series that in every three years the adult population, and within that, a parental subsample is asked about public education. Thus, information on the viewpoint of parents and society as concerned stakeholders is available regarding particular issues of the evaluation of public education.

(48) The public education survey on education conducted at the end of 2005<sup>12</sup> shows that, at the time, only barely ten per cent of parents thought that the results of assessments like, for instance, the ones produced by National Competency Assessment, were the solely the concern of school headmasters and teachers. 43 per cent of adult residents representative of the total population and included in the sample responded that anyone interested should be informed about the assessment results. The opportunity must be given to everyone to become acquainted with the results of any school, for instance via the Internet, since schools are funded from public monies, therefore their results must likewise be public.

(49) An important outcome of the public opinion study was that it came to light that the public has far greater demand for publicity than the information afforded to them by individual schools or by the education policy through regulation, on the effectiveness of education. It comes as no surprise that there is greater interest in education in families with children of school-age than among the Hungarian populace in general. Nonetheless, it is striking that parents are far less indecisive when they have to articulate their own views. Hungarian society not only wants assessments to be public, but also deems mandatory competency assessments whose results the school must take into consideration useful. Forty-two per cent of respondents agreed with this statement, with a mere eight per cent saying that these assessments are not useful at all, and that each school must meet its own goals and satisfy its own maintainer, rather than satisfy the criteria of national assessments.

(50) Two factors regularly pose considerable difficulty in operating the evaluation system. Firstly, even though there has been university-level training to this end for years, currently the number of adequately trained professionals is not sufficient. This impacts several areas, as there is insufficient analysis-research capacity, and thus the generated databases are not utilised, nor are secondary analyses made, and, accordingly, our expertise in evaluation does not increase at the sufficient pace, either. But there is likewise insufficient expert capacity to implement the utilisation of the assessment results by institutions and school maintainers in

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<sup>12</sup> Such studies have been conducted regularly since 1990.

the expected quality. Secondly, there is the problem of money. The Hungarian assessment system is very resource intensive and, by comparison, its operation is underfunded. One serious consequence of this was when in 2005, as a result of a government austerity measure, the National Assessment of Basic Competencies was simply cancelled.

(51) One guarantee of the continued existence of assessments is perhaps that since 2006 the Public Education Act has made these obligatory. And with regard to boosting expert capacity, the central education administration has already taken – and will continue to take – steps. However, these steps have to date failed to produce a breakthrough. Government funding would most likely be required to this end, and the tasks specified in the documents of operative programmes affiliated with the New Hungary Development Plan also include the transformation, development and expansion of the assessment and evaluation system. TÁMOP 3.1.8 programme has not yet commenced at the time of writing this report (in the following chapters, however, the measures are referenced under policy initiatives.)

### **Chapter 3: System evaluation**

(52) In the 1970s and 1980s, the evaluation of Hungary's educational system lacked regular, standardised and public assessment mechanisms. At the same time, it must be seen that prior to 1985 characterised by a highly input-based regulatory system, where inspectors watched over the effectiveness of schools, or more precisely over their stringent compliance with regulations, system-level evaluation had no real ground in reality. Education research and, within that, primarily empirical sociological research did, however, play a role, and it was particularly important, particularly on account of easing professional isolation, that Hungary (as it is mentioned in the previous chapter) had already joined IEA very early on, in 1968, and participated in international research projects.

(53) The first student performance assessment in Hungary which can be said to have been systematic, serving the evaluation of the entire educational system, commenced in 1986, and, from 1991 to 2001 it was the so-called "Monitor Assessment", repeated every two years, that studied students' performance in five areas with the help of a sample representing several grades. This was how the form of assessment determining current assessments evolved, and such assessments today are not only suited for gauging student's current knowledge, but also enable comparisons and the identification of trends.

(54) Year 2001 witnessed the first competency-based performance assessment covering each student of a specific grade (thereby launching the already mentioned National Assessment of Basic Competencies), which, albeit with some minor changes, has been conducted annually since then. One of its characteristic features is that it is no longer confined to the evaluation of the country, but also facilitates the assessment and evaluation of the performance of individual institutions. At the same time, this is the only area where, year after year, a report is published, and this applies to the performance of the educational system. In this report, however, appraisal is based exclusively on the results of competency assessment, other criteria are not involved.

(55) There are a number of other mechanisms (most of which were already presented in Chapter 2.) that are capable of providing data facilitating system-level evaluation. However, standard aggregated reports are not prepared on the basis of these results. Actually, the uncovering of the general problems and the situation of the Hungarian public education system is performed when the need therefore arises in connection with the introduction of some strategically important documents. These are, however, occasionally so specific that in consequence the written comprehensive evaluation of the educational system is not available anywhere. The lack of comprehensive evaluation is, in all probability, also related to the continued lack of consensus with respect to the criteria of such an analysis and the efficiency indicators of public education.

#### ***3.1 Current practices***

##### **3.1.1 Overall framework for system evaluation**

(56) The greatest indicator of the strategic importance of system-level evaluation in Hungary is the way this area has become increasingly important over the past one or two decades. On the one hand, a large-scale comprehensive student performance assessment programme (OKM), already referred to several times, was introduced, while, on the other hand, diverse rules of law, which have changed or have been amended in succession to include this area



have been ascribing ever greater significance to assessments and to the use of assessment outcomes. Thirdly, the Ministry for Education helped establish an expert group, the so-called Indicator Committee, with a view to encouraging thought about system-level evaluation and gathering knowledge. The goal of this body is to establish and operate an educational indicator system in Hungary built on the OECD's and the EU's indicator systems. Fourthly, Hungary has, from the beginnings, been participating in major international assessments: these assessments, whose primary goal is to appraise the performance of the educational system, have become outstanding information sources for the evaluation of education.

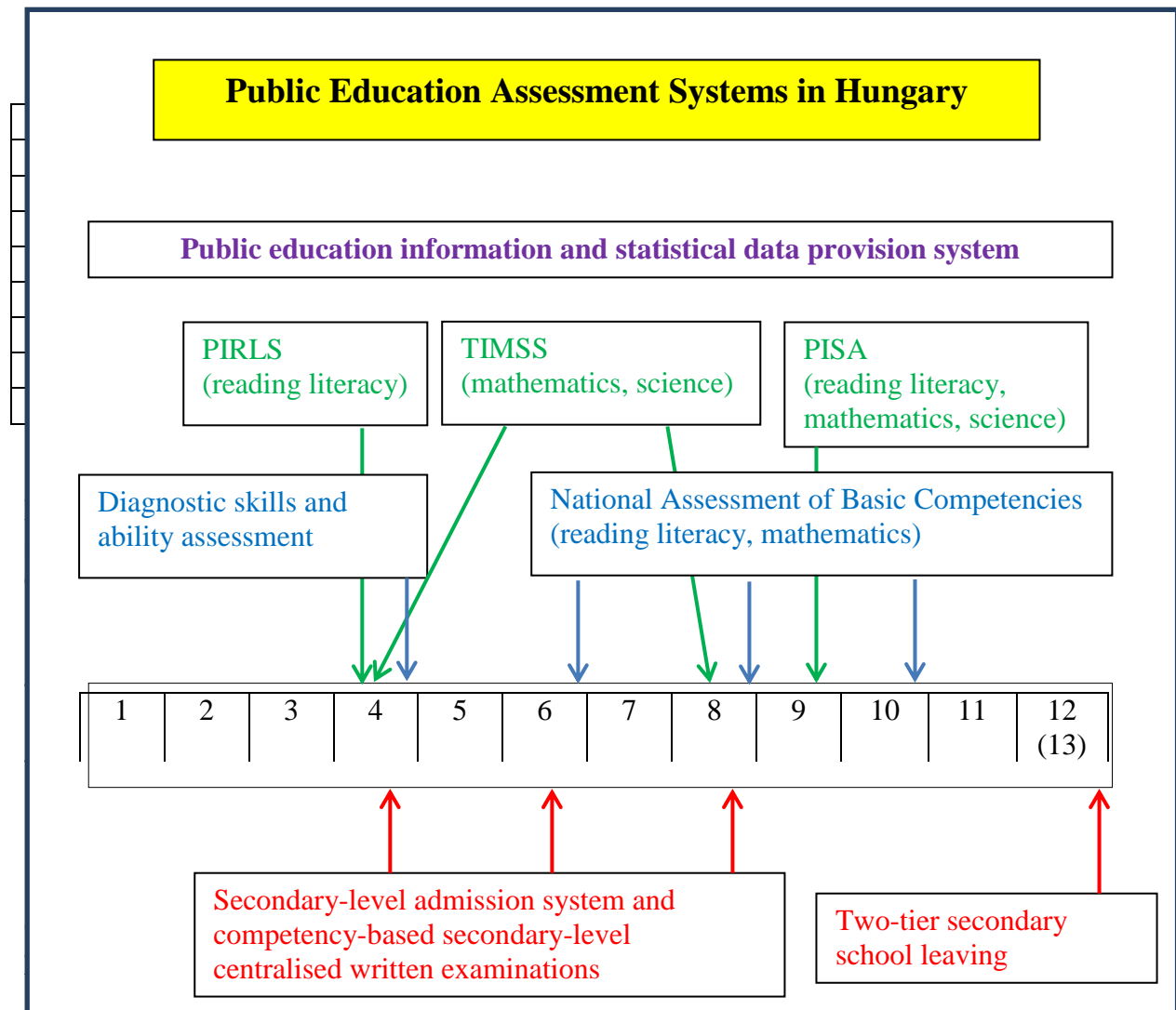
(57) With regard to national assessments, evaluation responsibility rests primarily with the implementing organization, namely the Educational Authority, the Ministry's background institution, which also wields official powers. Without the co-operation of schools, however, the assessment would not work. The responsibility for the reliability of results rests largely with the schools by ensuring an assessment environment fully in compliance with central regulations. Statutory measures likewise stipulate that schools, those in charge of schools and school teachers must participate in implementing national assessment responsibilities, and these measures also stipulate that it is the school headmaster's responsibility to ensure the conditions required for assessment.

(58) All systems whose existence is prescribed by statutory provisions and which directly provide quantitative data on one or all participants of public education, i.e. students, schools and school maintainers, are classified into Hungarian public education's assessment systems. The goal of all these systems is to provide, separately and jointly, a more exact and detailed picture of the entire system of public education and its individual details to facilitate political decision-making, diverse external evaluation systems and the stakeholders' self-assessment alike.

(59) The system's fundamental components are:

- I. Public education information and statistical data provision system
- II. The secondary-level admission system and the related centralised written examination system
- III. The two-tier secondary school leaving examination system
- IV. The pedagogical assessment and evaluation system
  - a. Hungary's participation in international assessment and evaluation programmes
  - b. The national pedagogical assessment and evaluation system

(60) The diagram below demonstrates the system's constituent elements and how it is built onto grade 12 (13) of public education:



(63) The public education and statistical data provision service is comprised of two main parts:

- The public education information system
- The public education institutional statistical data provision system

(64) The public education information system is a continuously operating information technology system, which contains up-to-date records of students' (educational identification number and affiliated data), educators' (educator identification number and affiliated data), public education institutions' (institutional identification number and affiliated data), and school maintainers' data. Some of the system's services are accessible to all Hungarian citizens, while others only to those entitled thereto, contingent on appropriate terms of access rights. Analyses and research can, obviously, draw upon the data content of the latter as well.

(65) The services of the system include but are not limited to:

- Recording of the public interest data of public education institutions and school maintainers,
  - o Data recording and modification,
  - o Data retrieval service,
- Storing student and educator records broken down by institutions,
- Storing and depicting kindergarten and school district boundaries,

- Tracking of academic results, feedback from secondary schools to primary schools,
- Form ordering system for schools,
- Textbook ordering system for schools,
- Providing institutional access to the electronic software of other public education programmes and ensuring the management of the right of access,
- Special messaging system through which the daily information of public education programmes can be communicated to institutions or to one of their target groups.

(66) The public education institutional statistical data provision system constitutes an Internet-based information technology system with the help of which institutions can comply with their annual statistical data provision responsibility. In doing so, they send detailed data on their entire educational and activity structure. The data is published by the Hungarian Central Statistical Office, but, obviously, public education systems can also use them directly.

(67) Both systems are undergoing continuous development in regard to the quantity and quality of services. Some of the development goals are:

- Expanding data content,
- Co-ordinating data content in the two partial systems,
- Increasing the level of integration of the two systems,
- Developing a link between central systems and local school information technology systems.

### *3.1.2.2. The secondary-level admission system and the central written examination system affiliated with it*

(68) In the Hungarian school system the transition from primary school (grade 8) to secondary school (grade 9) is a significant milestone for students and schools alike. Although affecting fewer students, a similarly important element for some students is the transfer to eight-grade (after grade 4) and to six-grade grammar schools (after grade 6). Precisely for this reason, these transitions are subject to statutory regulation.

(69) The most important fundamental principles are:

- Student's (parent's) free choice of school,
- The school headmaster's right to decide with respect to admission,
- Unified and public conditions of admission,
- Ensuring equal treatment.

(70) Secondary schools determine their own admission systems themselves, wherein they must specify precisely the type of courses they intend to launch, the criteria system and calculation procedure based on which applications for admission are judged, the special procedures they employ to judge applicants with special educational needs, etc.

(71) On several points, however, the statutory provision sets limits for schools in respect of setting the conditions of admission. Perhaps the most important among these is that secondary schools cannot organise their own written examinations. If schools request a written product, this can only be the examination result of the centralised written examination. Several years of experience shows that approximately half of Hungary's secondary schools do not require a

written examination, but decide on students' admission based on their prior academic attainments. Secondary schools must make all this public in a publication (admission bulletin) at the beginning of the academic year both in their own environment and in the public education information system.

(72) Those who wish to continue their studies will, if necessary, participate in centralised written examinations. In the light of the examination results they apply to secondary schools of their choice, indicating, at the time of the submission of their application, their first, second, etc. choices of institutions ranking them in their order of priority. With respect to the applicants, secondary schools establish, in line with their own admission rules, an admission ranking of students they deem acceptable, and decide on those they do not regard acceptable for admission. By equating the ranked list of students' choices of institutions with the admission "decisions" of schools, a central information technology system determines which students gain admission to a specific institution. Student choice yields priority in the decision-serving algorithm, which, however, can only prevail if the institution has deemed the student acceptable and if the student also fits into the institution's set number of admissible students. Many years of experience shows that approximately 70 per cent of students get admission to the institution of their first choice.

(73) The admission system comprises two basic components also featured in its name:

- The information technology system of secondary-level admission procedure,
- The centralised written examination system

(74) The information technology system of secondary-level admission procedure is essentially an Internet-based software facilitating primary and secondary schools to handle the entire administration of the admission process electronically.

(75) The system's services include but are not limited to:

- the electronic completion of admission forms,
- getting students to sign up for centralised written examinations,
- providing support in the administration of written examinations,
- electronic recording and storing of examination results,
- administration of applications to secondary schools,
- making it possible for secondary schools to rank students who have submitted their application to the given school,
- algorithm for judging admission applications,
- a subsystem to facilitate the communication of results.

(76) The data generated in the information technology system in each year allows the tracking of students' intention to continue their studies, schools' admission requirements, secondary schools' capacity, the number of school vacancies and the extent to which schools have filled their admission quotas. The information technology system for admissions constitutes a significant source of information for public education's stakeholders (education policy, school maintainers, schools, parents). Besides comparing the performance of those participating in the examinations, the storage of the results of the centralised written examinations also facilitates the theory-based evaluation of the examination's test sheets seen as instruments of assessment.

(77) The centralised written examination system requires students to complete test sheets in the subjects of Hungarian language and mathematics. The time allotted for completing each

test sheet is 45 minutes. Separate test sheets are prepared for the eight and six-grade grammar schools and for those wishing to continue their studies in the ninth grade. The Educational Authority commissions the preparation of the test sheets, makes the photocopies and sends them to the examination sites. The goal of the examination, from an assessment theoretical perspective, is the appropriate and reliable comparison of diverse examination performances.

(78) The informational material below provides the most precise information about the contents of the test sheets. It is available to all persons concerned on the Educational Authority's website.

## **INFORMATION**

### **ON THE EXAM PAPERS OF THE UNIFIED WRITTEN ENTRANCE EXAMINATIONS FOR SECONDARY EDUCATION ENROLMENT**

#### **GENERAL INFORMATION ABOUT EXAM PAPERS**

Students sitting for the entrance examination must complete an exam paper comprising ten tasks as part of the written examinations in the subjects of Hungarian language and mathematics. The allotted time for each paper is forty-five minutes, with a total score of 50 points per subject.

Made up of practicing educators, the committees responsible for the exam papers compile the test papers based on Hungary's National Core Curriculum. A fundamental principle guiding this work is that none of the currently available textbook series are given any preference over the other. The committees also recognise that individual schools proceed with curricular materials at a different pace and, accordingly, the exam papers primarily draw on the thematic materials of the grades preceding the specific grade.

The goal of the written entrance examination is, above all, to assess the basic skills, abilities and competencies required for a successful secondary school education, so none of the exam papers are traditional subject tests. Besides testing students on specific knowledge and their ability to apply processes acquired and practiced in the course of their studies, the assignments also provide an unusual opportunity for mobilising all learnt contents differently, testing students' ability to think in an imaginative way and be creative.

A separate exam paper is prepared for grade 8: for students aspiring to enter so-called talent management schools. The two different types of exam papers typically build on the same curricular content and knowledge, but the difference primarily lies in the share of simple and more complex assignment types, the extent to which learnt contents are applied autonomously and the depth of associations required for the solutions. The criteria for compiling exam papers, and the ratio of assignment types have not fundamentally changed as compared with previous years, therefore previous test papers available on the Educational Authority's Web site remain useful aids in preparing for the exam.

#### **ABOUT EXAM PAPERS IN HUNGARIAN LANGUAGE**

Nine out of the ten assignments concern a sub question, a sub-competency. To be able tackle them, students must be well versed in the language, and must have communications and spelling skills acquired in previous grades. They must also demonstrate age-appropriate reading literacy, composition, cognitive, and writing skills. In short, assignments require the application of contents learnt in the previous grades. The tasks do not primarily assess students' ability to reproduce formal grammatical knowledge, but they rather evaluate students' level of functional Hungarian language proficiency and how confidently they use

basic cognitive skills (e.g. recognition, organising, summarising, inferring, forming an opinion). Assignments may comprise literary, general knowledge and colloquial texts alike. The more complex tenth assignment involves composition writing: students must compose a well-structured, unified and complete text on a given subject in a given genre. Besides adherence to the designated subject and the required length (different for each grade), the composition must likewise satisfy basic linguistic accuracy, editing, spelling and stylistic requirements.

### **ABOUT EXAM PAPERS IN MATHEMATICS**

Mathematics exam papers do not exclusively assess factual learning associated with the subject, but in association therewith, the tasks are also a test of students' thinking. Formal knowledge serves as a basic tool for understanding assignments and problem solving. In tackling certain assignments, examinees must mobilise several different competencies. Besides the factual knowledge of the subject, problem-solving skills, sensitivity to problems, creativity, logical thinking, observation of rules and the ability to concentrate are required. In other words, concentration of attention and a satisfactory standard of written communication can also contribute to the successful completion of an assignment. Age-appropriate written communications skills are likewise an important competency. Accordingly, organised, legible and comprehensible written communication of the answers is also an expectation.

(79) Secondary schools are responsible for organising written examinations for applicants from primary schools and, pursuant to the Educational Authority assessment guidelines, they are also responsible for their evaluation. Since the consistency and accuracy of the correction is in the interest of those correcting the papers in the secondary schools, there is no need for centralised correction, which, in any event, would be extremely expensive. Approximately 3 per cent of a given age cohort sit for written entrance examinations in eight-grade grammar schools, and about 5 per cent do likewise in six-grade grammar schools. To gain admission to the ninth grade, over 60 per cent of the given age cohort sit for written entrance examinations, thus the examination results provide assessable information in respect of content.

(80) Experience shows that both the information technology system and the examination system fulfil their function well. One direction of development is to ensure that the requirements examinees must comply with in regard to the exam papers of individual grades be as similar as possible. The other main trend could be an increasingly deeper and more multifaceted analysis of data provided by the system with a view to more beneficial utilisation of such data with reference to all stakeholders of the educational system.

#### *3.1.2.3. The two-tier school leaving examination system*

(81) In Hungary, the school leaving examination is a state examination, which concludes secondary school studies and as such is strictly governed by statutory provisions at diverse levels.

The goal of the school leaving examination is to establish whether the examinee

- a) possesses the foundations of general education and culture and abilities rendering him/her capable of self-education;
- b) has acquired the appropriate academic knowledge, thinking, information acquisition and systematisation skills, is capable of organising his/her knowledge and is applying it in practice;
- c) is ready to embark upon his/her studies in institutes of higher education.

The school leaving examination certificate certifies secondary level education and is a prerequisite for certain types of employment and entry to further studies in higher education.

(82) Concerning this system, it is pivotal that statutory provisions spell out the content requirements of the examination subjects, the content and form of the examination assignments, and the examination procedure. Thus, conditions for preparing for and being prepared for the examination as well as of standardised information thereto are guaranteed for all. An important basic principle driving substantive regulation of the examination requirements is that, besides factual knowledge, priority is assigned to the ability of applying knowledge. The rationale of this is that these examinations come to resemble the assessment of subject competencies as close as possible. It is an important cornerstone of legal regulation that the examination system guarantees the greatest possible objectivity. Examination performance is assessed on a scale of 1 to 100 (percentage result), which provides substantially better comparability than the customary smaller grade scale (with grades of 1 to 5-7-10).

(83) In Hungary, admission to higher education institutions after passing the school leaving examination is not automatic. There is fierce competition for admission to various courses and majors. In this competitive framework, assessment is based on the performance at the school leaving examination, and therefore the school leaving examination system also plays a decisive role in determining prospects for further study in higher education.

(84) To be awarded with a school leaving examination certificate, students must pass examinations in four mandatory and one elective examination subject. The mandatory examination subjects are: Hungarian language and literature, mathematics, history and a foreign language.

(85) The school leaving examination is a two-tier examination system. Examinees themselves decide whether they wish to sit for the ordinary or advanced level examination in a given examination subject. The decision is, above all, influenced by one's intention to continue studies and enter higher education or not; it is almost impossible to gain admission to genuine "career" majors without advanced level examinations.

(86) Ordinary level examinations take place in secondary schools. Centralised exam papers are prepared for the written components of the examination, and although their evaluation takes place locally, it is based on centrally issued correction and evaluation guidelines. Secondary schools themselves can prepare ordinary level oral examination questions, obviously observing the framework set by examination requirements. Advanced level examinations are external examinations. Written examinations take place at examination sites independent of examinees' secondary schools, and are supervised by teachers unknown to the examinees, with code numbers assigned to examination papers. Those correcting the papers do not know whose paper they are correcting. Oral examinations take place before impartial three-member committees, unknown to examinees.

(87) The Educational Authority, already mentioned in Section 2.1, bears responsibility for operating the examination system. The Authority commissions the preparation of the exam papers as well as the correction and evaluation guidelines for written examinations at both levels, and is responsible for their photocopying and sending off to examination sites. The Authority also organises every other task related to the independent advanced level examinations. The Educational Authority also operates an Internet-based information

technology system to support the implementation of the school leaving examinations. This system tracks the entire process of the organisation of the examination ranging from application to the determination of examination results. Since its use is mandatory for all institutions involved in examinations, the data stored in its software provides an almost complete picture of the events and results of the examinations.

(88) The following is an overview of the school leaving examination system's services, primarily viewed from the perspective of an assessment system service. The school leaving examination system:

- registers the performance of a school leaving age cohort in compulsory and elective examination subjects,
- provides comparability of individual examination results,
- enables specialised teachers and experts to perform a full range and multifaceted analysis of examination results, which may thus serve as the basis of subject development,
- examination requirements are the most effective elements of the content related regulation of the public education system and thereby also directly impact work in the classroom.

(89) The school leaving examination system is a so-called "learning system." It is primarily so from an assessment theoretical perspective. One of the most important goals of processing the examination results is to facilitate that the exam papers in the individual examination subjects are at around the same level of difficulty each year, which makes the system absolutely predictable. Five years of experience has demonstrated that this requirement is fulfilled quite well.

(90) The data accumulated in the examination system offer numerous possibilities for producing characteristics and indicators applicable to public education stakeholders (schools, school maintainers). Such analyses are not – due to lack of capacity – yet being produced, so there is, obviously, potential for such developments. Even in the short term, it is possible to prepare analyses similar to the public education assessment system for secondary schools and their maintainers on the basis of examination results.

(91) The characteristic traits of the school leaving examination with respect to students will be presented in Section 6.1.2.

#### *3.1.2.4. The pedagogical assessment system*

##### **Hungary's participation in international assessment and evaluation programmes**

(92) Statutory provisions do not mandate participation in international assessments. Currently, Hungary is participating in three student performance assessments: the IEA TIMSS and PIRLS assessments, as well as in the OECD PISA survey. The assessments provide a picture of the educational system in its entirety. The Hungarian summary reports (of the most recent cycles) are published simultaneously with the international reports. The reports are available in English at [www.pirls.hu](http://www.pirls.hu), [www.timss.hu](http://www.timss.hu), and [www.oecd-pisa.hu](http://www.oecd-pisa.hu).



## **The national pedagogical assessment system**

(93) Hungary's national pedagogical assessment system operates in a well-integrated, logically sound legal environment:

- statutory provisions stipulate in which grades, in which competency areas and for whom participation in pedagogical assessment is compulsory,
- it simultaneously determines which institution is responsible for organising assessments (Educational Authority),
- it delegates assessment to the responsibility of schools, also with appropriate regard for labour law considerations,
- it stipulates that data generated by assessment be made public,
- it deems it compulsory for schools to analyse and utilise their own assessment results,
- in institutions where assessment results reveal major problems, it makes intervention compulsory for both the school and its maintainer.

(94) Under this system of legal regulation, the state provides the stakeholders of public education with the assessment system's – quite extensive and professional – services. At the same time, however, it also makes stakeholders responsible for the appropriate use thereof, and, whenever the need arises, for instituting necessary measures.

(95) The structure of the system:

Hungary's national pedagogical assessment system can, essentially, be divided into two sub-systems:

- criteria-oriented assessment systems with a diagnostic purpose for grades 1 and 4,
- competency assessments of a comparative nature for grades, 6, 8, and 10.

Owing to substantial differences, the two sub-systems will be presented separately below.

### **Criteria-oriented assessment systems with a diagnostic purpose for grades 1 and 4**

#### *Diagnostic development assessment system for grade 1*

(96) The system's goal is to provide teachers with an assessment tool at the initial stage of the school system capable of diagnosing basic abilities required for educational development. At this age, children's development and pace of progress is quite different. An educator obviously perceives these differences, however, in the course of classroom work the educator is not necessarily able to establish the causes of slower development. This is precisely what the assessment tool assists educators in. Its use, for this reason, is not compulsory. Statutory provisions only stipulate that at the beginning of grade 1 all teachers must establish the scope of students for whom the assessment would be useful, and actually has to assess these students at a later stage.

(97) Assessment tools can be used to explore the following areas:

- social motives and skills
- writing movement co-ordination
- understanding experiential correlations
- listening to speech
- experiential inferencing
- relational vocabulary
- basic numerical literacy

(98) Assessment methodology adapts to age-specific characteristics. The assessment is conducted in a playful manner with tools that elicit interest, in direct communication between the educator and the child. In the course of the “conversation”, the teacher takes note of the child’s responses, then records them by a software designed for this purpose. The software will generate the child’s individual ability profile. The use of the assessment tool package – despite it not being compulsory – is widespread in schools: in 88.7 per cent of institutions it is used on a regular basis, and on a national level approximately 30 per cent of the students (approximately 30,000 students) are assessed annually.

#### *Diagnostic assessment in grade 4*

(99) In line with age-specific characteristics, competency assessment in the classical sense is not justified for this grade. In grade 4, so-called diagnostic assessment tools can be used to gauge the developmental level of students with respect to certain basic competencies and skills in comparison with the level characteristic of the given age cohort. Since at this age differences are seen as natural, assessment results are not really suited to characterising a school’s work. The assessment goal in grade 4 is primarily to inform educators on the developmental level of a child’s skills and abilities, in order to develop special developmental trends and methods based on such data, “tailored” to a given group or even to individual students.

(100) Instead of subject knowledge, assessment in grade 4 focuses on basic skills and abilities, which take many years to develop (literacy in writing, reading, arithmetic, cognitive skills). Assessment is compulsory for all students, but the Educational Authority will only process data from a representative sample comprising 200 schools. This is because the assessment’s goal is to diagnose individual development, which must be carried out locally at the school. It is therefore sufficient to process the above sample to establish national trends. After completion of the test, schools can record their own student’s results in an online software operated by the Educational Authority and can produce their own individual, class or school-level analyses. Indicative of the system’s success is that the number of logins into the software topped the 32,000 mark in a single year. Owing to the predictably slow erosion of diagnostic tests, using European Union funding, the development of a multi-stage assessment tool system to eventually replace the current assessment at grade 4 has commenced. According to plans, the new system will enable a diagnostic type of assessment of the development of basic competencies from grades 1 to 6 with due consideration for students’ age-specific characteristics.

#### **Competency assessments of a comparative nature in grades 6, 8, and 10**

(101) The primary goal of the National Assessment of Basic Competencies introduced in 2001 (and already mentioned in Section 2.1) is that, in the light of objective data, it provides as detailed and multi-faceted a picture of the effectiveness of schools as possible so that data on Hungary’s schools are comparable, which thereby facilitates institutions’ self-assessment and contributes to the completeness of external assessment.

(102) The National Assessment of Basic Competencies is an annual assessment system extending to nearly all of Hungary’s students in grades 6, 8, and 10. Exemption from the assessment is granted only to students with special educational needs of a magnitude that prevents them from participation: autistic students, students with intellectual disability and students with severe physical disability. Students with dyslexia, dysgraphia and/or other

learning impairments participating in integrated education take part in the assessment, however, their results do not appear in the schools' public reports. As part of the assessment, students complete test booklets containing mathematical and reading literacy items (with a duration of 4x45 minutes), and, with the involvement of their parents, they, on a voluntary basis, also answer the questions of a questionnaire assessing their family background. The items used in the assessment do not measure the extent to which knowledge contents specified in a given grade's curricular requirements have been acquired, the assessment rather examines the extent to which students can apply the knowledge they have acquired in public education to solve items taken from everyday life. The framework of the contents of the assessment – which defines cognitive domains, sets item types and ratios – constitutes an appendix of a ministerial decree. Accordingly, the content of test materials is also set forth under statutory provisions. The assessment's test materials are compiled by the Educational Authority's Department of Assessment and Evaluation (OH KMÉO). The institution's work is described in detail in Section 3.1.3.

(103) As part of the assessment, data collection takes place annually at the end of the academic year, in the last week of May. Institutions receive test materials in sealed packets, which can be opened half an hour prior to starting the assessment. With a view to standardised assessments, the School Coordinators' and Test Administrators' Manuals summarise institutions' assessment-related responsibilities and the procedural order, and compliance with these responsibilities and the procedural order is mandatory for all institutions. External quality inspectors oversee the assessment to ensure compliance with the applicable regulations, and subsequently file a written report thereof to the Educational Authority. A quality inspector is present in every school building on the day of the assessment, and he/she is entitled to freely visit classes. The quality inspector does not remain continuously in the classrooms of the relevant classes; the institution's teachers are in charge of managing the conduct of tests. Institutions must comply with their assessment related administrative duties using the online software operated by the Educational Authority.

(104) As of the 2007/2008 academic years, test booklets and background questionnaires come with stickers bearing students' individual assessment identifiers with a view to identifying assessment materials. It is the educational institution that is exclusively entitled to and capable of generating students' individual assessment identifiers using the online software developed and operated by the Educational Authority. The assessment identifier serves several purposes. On the one hand, the student and his/her parents use it to gain access to the student's assessment results after the publication of data. On the other hand, it enables the individual level based longitudinal examination of results. Accordingly, by linking data in grades 6, 8 and 10, it also provides an opportunity for demonstrating pedagogical added value (available as of the assessment reports of the 2009/2010 academic year).

(105) Marking the assessment's test materials is performed centrally, by the supervision of the Educational Authority's Department of Assessment and Evaluation, which strictly adheres to quality assurance regulations. These guarantee that the correction of open-ended questions is conducted in a unified manner. After performing data input, data cleaning and statistical data processing (e.g. computing students' ability scores and items' parameters with Item Response Theory models, weighting and standardisation, etc.), the Educational Authority publishes assessment results in February of the year following the assessment, that is, nine months following the assessment. In fact, the Educational Authority produces several different reports at several different levels. Besides a National Report, it publishes the School Maintainer, the School, the School Site Reports and the individual-based Student Reports.

Additionally, publications on the items and their characteristics presenting the characteristic traits of test items (scoring guide, statistical parameters, content framework classification, brief summary) are also compiled.

(106) The National Report contains aggregated data and provides educational system indicators primarily for education policy makers and education researchers. The National Report describes the results in a brief 10-12-page summary illustrated by tables and diagrams.

Contents of the National Assessment of Basic Competencies:	
Legal background	7
The 2009 National Assessment in figures	8
About the assessment	9
Results	11
Recommendation	19
Diagrams and tables	20
National distributions and their trends	20
Distribution by competency level	24
Distribution by region	27
Distribution by settlement type	45
Distribution by school type	48
The results by gender	51
The impact of family background	54
Individual ambitions and parental expectations	67
Correlation between school factors and results	75
Appendix	101
Family background index (FB index)	101
Index derived on the basis of the student composition of the school site	103
Index derived on the basis of the ratio of students with learning impairments	103

(107) The Educational Authority sends the National Report to the Ministry of Education and Culture, which in turn publishes it on its website.

(108) The School Maintainer, the Institutional and the School Site Reports present the aggregated results broken down by school maintainers, institutions and school sites using several different kinds of diagrams and charts. The School Site Report is the basic type of report, since in Hungary's educational system it is typical of numerous schools or several schools located in different settlements to constitute a single public administration entity, possibly under the management of a single headmaster. The school site report summarises results by grade and by type of training with the help of the following groups of diagrams and charts. The report starts with the summary of a settlement's population data, then, by assessment area, contains pages with the following titles: Average Results, Main Characteristics of Ability Distribution, Average Result in the Light of the Family Background Index, Ability Distribution, Changes in the Average Results, Changes in Ability Distribution, Main Characteristics of Ability Distribution by Classes, Ability Distribution by Classes. Institutional and School Maintainer Reports provide similar types of data, and summarise the results of the school sites/the school maintainer's institutions. Besides data on institutions, in order to provide a basis for comparison, the reports also present national and regional results and results by school type. School Maintainer, Institutional and School Site Reports are public

and can be downloaded from the Educational Authority's website by providing the institution's name or identifier.

(109) The Student Report presents individual students' results, the ability score attained by the student, the results reached in each item, and how these results compare with national results and the results of the student's own school and class. Access to student reports requires the entry of the assessment identifier, and such data are thus only available to the student and his/her parents.

(110) In the most recent two assessments the following report types were compiled – in the indicated amounts – and made public (Table 5). In the Hungarian school system, schools are often large institutes with more than one school building on different addresses and teaching staff, sometimes in different communities. Hence, schools sites are defined as the different addresses of an institute, and in the assessment system school site reports are the most extensive among the different types of reports, with the most details about the school sites' achievement and contextual data, and with one report for every grade and study programme of a school site. School site summary reports contain tables showing the most important data from the school site reports summarized for every grade, programme type. The institute reports (institute summary) reports show the whole institute's results by grade and programme type (altogether), and compare the institute's school sites, while the school maintainer and school maintainer summary reports are about the maintainer's results and about comparing a maintainer's schools.

Table 5. Report types of National assessment of Basic Competencies

Report type	In 2008 (number)	In 2009 (number)
Student	302,646	288,219
School site	7,430	7,297
School site summary	-	3,672
Institute	5,712	5,456
Institute summary	-	2,901
School maintainer	3,524	3,384
School maintainer summary	-	1,629

(111) Besides reports, institutions can analyse their own results using the FIT analysis software, with the help of which they can access all the assessment data of all their students and can prepare additional analyses. They can study results by items or can compare the results of the school's different student groups (e.g. boys and girls). By logging into the FIT software, the school can see not only the results of students who have completed the assessment in that particular school, but can also access the assessment results attained by their own students in their former schools. Thus, for instance, after the results are published (that is, at the beginning of the second term), a school can also look up its grade 9 students' assessment results from grade 8 of the primary school. The software is so popular that the Educational Authority has registered over 28,000 logins during a single year.

(112) Besides these reports, the Educational Authority also issues materials facilitating the interpretation of these reports. It also organises lectures and training sessions for educators, school leaders and school maintainers to demonstrate how the reports can be interpreted and

utilised in evaluating the work of schools. Researchers can access school and student databases of the assessments, which are available to them free of charge for the purposes of secondary analyses. The characteristics of the National Assessment of Basic Competencies with respect to students are presented in Section 6.1.2.

#### 3.1.2.5. Thematic Surveys

(113) The Educational Authority conducts most of its official thematic surveys based on a work schedule, albeit statutory provision also allows for inspection based on individual requests (complaints, reports). The survey takes place in the form of on-site inspections or other means of obtaining data and information.

“The educational authority acting in its scope of public educational duties examines whether the provisions pertaining to

- the requirement of equal treatment,
- the performance of tasks pertaining to compulsory admission,
- the number of students/children in a class or group, the prevention of accidents involving students or children, the lesson load of students;
- the organisation and arrangement of state examinations;
- the conditions of employment, the administration and authenticity of obligatory educational documents, the claim for budget subsidy;
- the existence of the minimum (obligatory) tools and equipment;
- the fulfilment of the obligation to furnish data as specified in this Act and the publication of the data;
- the gratuitousness of education, the provision of textbooks and other equipment for students

are met within the scope of official thematic surveys.”

*Article 95/A (4), Act LXXXIX of 1993 on Public Education*

(114) Eighteen national official and professional thematic surveys have taken place in recent years whose final reports are accessible to the public on the Educational Authority’s website.<sup>13</sup> Several of these reports could, also in a professional sense, constitute a decisive element in a system-level evaluation. A good example of the broad scope of assessment underpinning such reports is the following summary of the national thematic survey of Hungarian primary level arts education institutions.

#### *Report on the thematic surveys of Primary Level Arts Education Institutions, 2003*

The National Public Education Evaluation and Examination Centre (OKÉV) organised the inspection in two steps.

In step one, after obtaining the educational-administrative documents of selected institutions, an eight-member educational-administrative expert group performed analysis of the documents centrally, the results of their work were recorded on unified questionnaires created for this purpose. Simultaneously, work contracts were inspected with the participation of two employment lawyers.

Step two involved on-site inspections, with as many arts education experts conducting the

<sup>13</sup> <http://www.oh.gov.hu/kozoktatas/kozoktatasi-hatosagi/elvezzett-hatosagi>

inspections as there are branches of art taught at the given institution. In the case of some institutions operating with a conspicuously larger than average student population and school site, a larger expert group was commissioned, with due consideration for local characteristics. Inspection covered 69 institutions and their sites. Inspection of training conducted at the seats of institutions covered every branch of art. The inspection of institution sites – which covered 50 per cent of all sites affiliated with institutions involved in the inspection – showed that the distribution of the branches of art complied with those set forth in the selection criteria. Fine and applied arts were inspected in 42 institutions, the art of acting and puppetry at 26, the art of dance at 59, and the art of music at 44 institutions.

Besides a summative written report of educational-administrative inspection, a standardised questionnaire is any inspection's most important written document. The unified questionnaire made experts' work more organised, rendering summative result production and analysis easier at the review stage. A separate questionnaire was prepared for the inspection of educational documents, institutions and school sites.

Prior to embarking on their assignments, professional experts conducting on-site inspection received a questionnaire compiled by educational-administrative experts, including a summary report and priority tasks recommended to the institutions by the experts. In short, the experts turned up prepared for carrying out the duties of inspection.

On-site interviews were also conducted with school leaders, heads of branches of arts and departments, faculty representatives, parents' representatives, students' representatives, and students in their last year of studies in the given institution.

A five, subsequently six-member senior expert committee oversaw the professional management of the inspection. It was the committee's responsibility to draw up the inspection's criteria system, to select experts to be involved in the inspection, to compile the inspection questionnaires. Senior experts participated in preparing experts for their task and they were also available for consultation during inspection.

A summary report was prepared for each institution, the most important findings of which were orally communicated by the experts to the institution's management, providing an opportunity for discussion. Institutional level analyses were also sent to the institution's maintainer. A national evaluation report was drafted in conclusion of the inspection.

### **3.1.3 Competencies to evaluate the school system and to use evaluation results**

(115) The Educational Authority's Department of Assessment and Evaluation (OH KMÉO) is responsible for preparing questionnaires and sheets used in full-scale assessment. Further, it is also in charge of tasks connected with the recording of data received and the drafting of the reports for schools and school maintainers. The goal of the activities of OH KMÉO is to provide education policy experts and education professionals with empirical data. Besides the National Assessment of Basic Competencies, OH KMÉO is also responsible for the national management of international assessments, discussed in greater detail in Section 3.1.2, and is in charge of interpreting the data therefrom. In short, a single entity is practically in charge of all student assessments underpinning system level evaluation in Hungary. This is an effective solution owing to its potential for developing special assessment methodology related knowledge and harnessing synergies. Admittedly, however, it also gives rise to the already mentioned problem of the lack of free research analysis expert capacity for assessment. Governmental efforts would certainly be necessary for increasing this capacity.

(116) In 2009, there was in fact an initiative to engage the researcher community. As one of the stages of the “socialisation process” of international assessments three workshop conferences were organised upon the Ministry’s initiative at the Hungarian Institute for Educational Research and Development in collaboration with the staff of the Educational Authority’s Department of Assessment and Evaluation. The workshops were designed to expand the researcher base, assuming that primarily this researcher community had interest in the professional analysis of international assessment databases and, further, that they were interested in conducting diverse secondary analyses. Accordingly, the designated goal of the workshop conferences was to enhance the expertise of those utilising and interpreting international assessments. A professional publication has also been compiled on the basis of the workshop conference proceedings. Besides lectures delivered there, the publication also deals with assessment databases and software, SPSS modules and programmes required for analysis. It is too early, however, to appraise the impact of this initiative. Moreover, it must be noted that it was a one-off project, which has not been repeated and currently there are no plans for its continuation, either.

(117) Pursuing similar goals, the Educational Authority hosted representatives of institutions and their maintainers at regional events in 2009 as well. The objective of these events was to promote the utilisation potential of assessment data and their accurate interpretation. To put results of national assessments to effective use, education stakeholders need to see and understand the potential inherent in these data. At the same time, obviously no professional analyses will be produced at the local level. It is also pivotal, therefore, that the expert community possesses the appropriate knowledge in this field and that institutions receive some sort of specific assistance rather than just a mass of theoretical knowledge. Diverse assessment and evaluation training sessions will facilitate the attainment of the former goal, while the promotion and sharing of educational best practices capitalising on national assessment results will facilitate the latter aim.

(118) Drawing on several decades of diagnostic assessment and research, courses offered by Szeged University for experts play an outstanding role in the training arena. The majority of professionals working as assessment experts today in Hungary completed this programme, which is the oldest in the country. Recent years have witnessed the emergence of two-year post-graduate courses for certified assessment and evaluation professionals at other higher educational institutions as well. Nowadays, a multitude of places throughout Hungary offer assessment-themed trainings with almost unmonitorably diverse contents and quality. These, however, prepare teachers more for day-to-day practice and not typically for the effective utilisation of the results of system level assessment.

(119) The Ministry of Education contributed to the dissemination of best practices with a combined instrument and several billion HUF in funding. In 2007, 2008, and 2009, school maintainers were allocated, pursuant to statutory authorisation, state funding in support of priority work by educators working at educational institutions under their maintenance. In line with the objective of the call for tender, those institutions were allocated funding that had already performed in-depth analysis of their national assessment and evaluation results in the years prior to 2008, and that, based on this analysis, had reworked their local curriculum and institutional quality management programme, or drafted a specific action plan for development. By this call for tender, the Ministry recognised educators’ special efforts in quality development.



(120) Experts evaluated grant applications in line with the statutory provisions, and highlighted parts that were of exemplary value and could also aid other institutions. Based on this, the issuer of the call for tender collected five groups of best practices and published them on its website. (A condition of the call for tender was that winners would consent to their bid documents being made public.) The first group of best practices aims to process the data of national assessments and to formulate experiences. In the second group, institutional development programmes incorporating assessment results are publicized, Institutional Quality Management Programmes (see Chapter 4.) reworked on the basis of national assessment results are found in the third. The best practices of the fourth and fifth groups provide ideas for the renewal of the organisation of learning.

(121) The Educational Authority asks experts on the National List of Experts already mentioned in Section 2.1 to prepare official authority and professional evaluations. In April 2010, the names of 4,544 experts figured on Hungary's National List of Experts. Their data sheets are accessible to the public and provide experts' contact information, area of specialization and field of activity. It is possible to search the expert database by geographical location and expertise and the selected expert can be contacted immediately through the system.

(122) Besides individual institutions, their maintainers and the Educational Authority, numerous educational consulting companies who play an important role in assessment in Hungary also request the services of these experts. Currently, school maintainers and institutions alike contract such companies more frequently for complex projects rather than seeking out relevant expertise in diverse areas on a one-by-one basis.

### **3.1.4 Using system evaluation results**

(123) In Hungary, statutory provisions have, for the past few years, stipulated that the results of national assessment and evaluation must be published in the Ministry of Education's official gazette and on its website. The law also provides that institutional level data obtained in the course of assessment and evaluation must likewise be made accessible for the purpose of further processing. Additionally, the national organisation in charge of the assessment returns the data aggregated at the school level (together with other data for comparison) in a school level report to every school. (In recent years the paper-based report has been replaced by an electronic version, which institutions can download from a webpage.)

(124) The most important objective of the National Assessment of Basic Competencies is to develop an assessment culture in schools; another aim is to generate a feedback loop to facilitate development processes concerning the effectiveness of the professional performance of schools (see Section 3.1.2). Introductory Chapter 1 has already mentioned that in Hungary schools possess a comparatively large degree of autonomy in organising their own pedagogical activities. Accordingly, schools themselves decide on how to utilise the assessment data returned to them. There are, however, research data showing how schools actually utilise these.

(125) Obviously, in the long term, only improvement in performance can confirm that the objective of competency assessments has been attained. However, school feedback can also provide a short-term baseline reference point regarding institution level utilisation and advantages of the assessment results. In conjunction with the 2004 assessment, the third one

in a row, over three-quarters of school headmasters deemed the National Assessment of Core Competencies useful both in regard to individual subject areas and in laying down the foundations for an assessment and evaluation culture.

(126) In addition to being able to judge its usefulness, the way individual schools specifically used competency assessment results returned to them also constitutes an extremely important feedback. Data from a survey conducted in March 2009 using a representative sample comprising nearly one thousand schools<sup>14</sup> revealed that school headmasters primarily use the results of the National Assessment of Basic Competencies for making students practice assignment types at school, for designing development programmes and for facilitating students' catching up. They also discuss and interpret the results in their own schools. The least frequent use of these results was to assess students or teachers. (It is, however, important to note here that headmasters probably interpreted this issue in a way that students are not given marks for the tests. This interpretation is likely to be rooted in the problem already indicated in Chapter 2, namely that the Hungarian language does not feature separate words for individual evaluation types, feedback on students' performance is called "assessment" just like national tests and the study of the impact of development programmes.)

(127) National assessment targets school maintainers as well as institutions. Regarded as a priority target group, as of the second year following the introduction of the assessment, all school maintainers receive a so-called school maintainer report on the performance of students attending their institutions. And since the 2006 amendment of Hungary's Public Education Act, local governments maintaining institutions cannot remain passive recipients of competency assessment results. Currently effective statutory provisions assign responsibility to local governments in the event that the institution they maintain fails to reach a specified minimum assessment result. A local government survey conducted in Autumn 2007<sup>15</sup> presents a picture of how local governments, the largest single group of school maintainers, respond to national assessment results. One in three local governments responded that it put these results to use in its managerial work as a school maintainer. The fact of utilisation heavily correlates with the character of a given settlement: some one-third of settlements, and over half of cities have responded in the affirmative to this issue.

### ***3.2 Implementation of system evaluation***

(128) The National Assessment of Basic Competencies was launched in 2001, since then, in the past almost 10 years, many of its elements have gained in scope and changed. Over the years, the range of grades assessed have changed and been expanded, the population of centrally analysed students increased, nearly the entire administrative system of evaluation has been computerised, quality control has attained full coverage, the content of the reports has been continually extended, reports on schools have become public and are now available on-line, and, by introducing the assessment identifier, students can now be monitored and their individual results can be fed back.

(129) The first assessment covered grades 5 and 9 and took place in the first quarter of the academic year, i.e., it provided data on the entry points of ISCED 2 and ISCED 3. By introducing the assessment, the express aim of the decision-makers at the time was to develop the assessment culture of teachers and to familiarise them with competency-based exercises, and to incorporate competency development into teachers' thinking. The fact that it was the

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<sup>14</sup>School survey, 2009, Hungarian Institute for Educational Research and Development

<sup>15</sup>Local government survey, 2007. Hungarian Institute for Educational Research and Development

entry points that were assessed also suggests that the implementers of the assessment principally wished to supply schools and teachers with information that served student development. This is also confirmed by the fact that from each school only the data of 20 students were collected for central evaluation, on which the system provided feedback by the end of the academic year. The majority of the tests remained with the schools, where teachers received recompense for their compulsory correction.

(130) At that time the system already featured an element that each institution received an objective report based on the data gained from the centrally collected tests, through which it was possible to compare school results with countrywide results and those of other schools. The reports were not yet public: each school was only given its own report. The first assessment was hence characterised by a certain duality. Nevertheless, certain elements were already there to support schools' self-evaluation with objective data; other elements, on the other hand, indicated a will to set the course for development at the entry point.

(131) In the next academic year there was a change in the target population and the date of assessment, as it covered students in grades 6 and 10 at the end of the academic year. In academic year 2003/2004, grade 8 was added, and the assessment reached the target population of its current scope. A centrally corrected sample of 20 students per school remained unchanged at the time, but the responsibility of teachers to correct the tests and the related recompense was no longer part of the system as of the second assessment. The scope of centrally collected tests, which were corrected and analysed in a standardised procedure, was first expanded in 2006, when the data of students in grade 8 were fully collected and processed for the first time, and with the assessment in 2008 the central analysis has become full-scale. Table 6 summarises the target population of assessment and the scope of students involved in the central evaluation broken down by academic year.

Table 6. Target population of national Assessment of Basic Competencies

<b>Academic year</b>	<b>Grade</b>	<b>Students included in central data processing</b>
2001/2002	Grades 5 and 9	20 students from each school
2002/2003	Grades 6 and 10	20 students from each school (and from each track within a school in grade 10)
2003/2004	Grades 6, 8 and 10	20 students from each school (and from each track within a school in grade 10)
2004/2005	No assessment due to financing problems	
2005/2006, 2006/2007	Grades 6, 8 and 10	Grade 6: every student from 200 schools; Grade 8: full; Grade 10: 30 students from each track from each school site
2007/2008, 2008/2009, 2009/2010	Grades 6, 8 and 10	Full-scale

(132) In addition to the above-mentioned changes, following the assessment in the school year of 2006/07, school and maintainer reports became public, and are publicly available on the Internet. Making school results public was a move preceded by several debates; its supporters stressed that the data of public institutions, collected with the use of public funds were of public interest, whereas those against it mainly cited susceptibility of such data to misconstruction and the risk of their misuse. The government and the Educational Authority

sought to respond to the demand for publicity and at the same time wished to reduce the risk of misuse by publishing the school reports in a way that they could be consulted only by the institution concerned, but they did not publish any data series based on which ranking could be made possible. Consequently, it is difficult to create ranking tables, while in addition to simple average outcomes (and their confidence interval) the reports disclose a number of other data, thus refining the picture gained of the institutions. Moreover, there are guidelines and other auxiliary materials to help interpret the reports and these also point out as to what the data can or cannot be used for.

(133) Starting from the 2007/08 academic year, the introduction of assessment identifiers permits the monitoring of students. Therefore, new elements are added to the report in academic year 2009/10, which will feature feedback on the two-year-long development of students in addition to that of the correlation between the family background index and the school's performance. From the very moment of its introduction, the National Assessment of Basic Competencies sought to present students' achievements in a contextualised manner, so since the drawing up of the first school-level reports, the report has included a set of diagrams displaying the connection between the socio-cultural index – calculated from the data in voluntary student questionnaires – and performance. Monitoring student development was, however, at the time unfeasible, as linking personal data with performance indicators in a national database was in conflict with the personal data rights defined in the Hungarian Constitution. In order to overcome this legal barrier, in 2008 the Government introduced the assessment identifier and the online computer software generating it, in which the schools can produce assessment identifiers for their students once they are logged in. The central database displays only the assessment identifier, which in this way is unsuitable for identifying students, but is convenient for comparing the assessment results of the different years. Another important course of development is the enhancement of the analysis skills of schools.

*Dilemmas concerning the assessment:*

(134) The changes in the assessment system all reflect how the objectives of the system have been modified over time. Educational policy makers and education researchers defined various demands and concepts with regards to the central assessment system and were often confronted with contradicting demands. There were – at times heated – debates and clashing concepts and the evaluation system itself underwent changes in response to the goals that were set.

(135) The current form of assessment reflects the power and accent of trends and ideas in educational policy according to which central assessment is regarded as a source of information necessary for the evaluation of the institutions' work, that is, as a basis of self-evaluation and accountability. The school reports present the results to the institutions themselves, to educational policy makers and to the broader public, whereas educational policy renders various obligations and incentives to the assessment results. One such obligation is that institutions must indicate in their quality management programme how they intend to make use of the assessment results. This goal is also furthered by the action plans institutions achieving poor results are required to adopt, or by central calls for tenders in which the award of support is conditional on assessment results.

(136) The need for assessment results to imply more serious consequences for the institutions is often expressed, for example, by linking certain elements of the financing system to assessment results. It is done either by allowing the financing system to punish

institutions with lower performance levels or by granting underperformers extra funds under specific conditions of use and imposing on them the obligation to improve results. One frequent reason in support of this concept is that, in its current form, the institutions disregard the results and do not take the evaluation seriously; unconcerned institutions are mostly those facing problems in other areas as well. Evaluation thus fails to achieve its goal, according to which it should, as a compelling force, increase the effectiveness of the education system where it is most needed. It is important to note that this opinion is not confirmed by assessment results and the reports of quality assurers.

(137) However, some of the experts and education policy makers as well as the Educational Authority, which is in charge of organising the evaluation, criticise this policy in several regards. They think that linking assessment results to such severe consequences would encourage the actors concerned to evade the system and ‘play tricks’, and hence assessment results would become unreliable despite the omnipresent quality controllers. Furthermore, it is difficult to provide justification for judging the entire work of a school based on a single evaluation that covers merely two areas of competency, when it pursues diverse educational and teaching activities and performs a function which cannot be grasped through central evaluations in many respects.

(138) In the current system, where interpreting, evaluating and processing the results is primarily the task of schools and their maintainers, it is also in the interest of the maintainer and the institution itself that these results reflect the actual situation, since only then can they make use of them for the purpose of quality management. Besides a standardised procedure and a central quality assurance system and processing, the basis for ensuring the quality and reliability of assessment results is therefore to make institutions and the maintainers directly overseeing them interested in the reliability of results.

(139) A group of education researchers and policy makers still views the National Assessment of Basic Competencies as the diagnostic starting point for individual student development. However, in its current form it is inconvenient for this purpose for a number of reasons. On the one hand, the test materials themselves are unfit for serving this cause since the exercises, which are placed in a realistic context and are often complex and made up of several steps, are of no help in localising problematic competency areas. On the other hand, the time required for central evaluation (nine months between the survey and the publication of results) virtually makes it pointless to analyse individual student results. For an assessment to be suitable for a diagnosis with a view to inducing development, easy-to-understand immediate feedback on the exercises is necessary. The need for an assessment which would form the basis of student development and the need for an assessment which would ground schools’ self-evaluation are therefore non-compatible aims, which cannot be realised by applying a single test material and procedure. The national assessment system has certain elements which fulfil a development facilitating function, such as the assessment in grade 1, and the Skills and Ability Assessment in grade 4, but in the upper grades there is no central testing to serve individual development.

(140) Another recurring demand is to make competency assessments function as the central secondary school entrance examination, this, however, is again impossible without damaging its functions to facilitate institutions’ self-evaluation. The long interval mentioned in the previous paragraph is another barrier to this function; the assessment cannot be transformed into an entrance examination without effecting drastic changes in processing. In addition, the rules pertaining to the compilation of a test surveying entire age groups of the country and

those of an entrance examination are different: for the former, exercises are to cover a broader scope in terms of difficulty in order to map up the knowledge of all students, those with the weakest and those with the best abilities alike, whereas the purpose of the exercises in the entrance examination is to make students' performance quickly and effectively comparable and to rank students according to their knowledge and abilities. The test should in this case comprise exercises of similar difficulty, which can aptly reflect the requirements.

(141) A frequent critique of the assessment system is that while educational policy ensures the generation of data, it pays little attention to and provides meagre resources for institutions to duly utilise these results. Institutions often lack the expertise, but most of all they lack the time and money to deal with the results in a competent manner, so at the most they can only quickly review the reports instead of performing deep analysis, interpretation and strategy building, which should ideally follow the receipt of assessment results. In the past years the Government made a number of steps to facilitate the processing of results, for instance it organised conferences, training sessions and lectures for teachers, heads of institutions and maintainers all over the country, and awarded funds under calls for tenders to the institutions processing assessment results. Schools' need for knowledge about the assessment results is indicated by the fact that a number of education providers embarked on and continue to deliver in-service teacher training programmes in competency assessment.

(142) Report download data and log in data in the FIT software demonstrate the level of result usage or at least that of interest in them; these data – up until 1 April 2010 – are summarised in the Table 7.

Table 7. Number of downloads of different report types

<b>Report of 2008, available from 20 March 2009</b>	
Type	Number of downloads
Maintainer	15 936
Institution	81 720
School site	63 498
Learning environment at maintainer	1 889
Learning environment at school site	13 213
Student report	701 491
Country report	29 969
<b>Total</b>	<b>907 716</b>
<b>Report of 2009, available from 1 March 2010</b>	
Type	Number of downloads
Maintainer	3 919
Institution	22 227
School site	22 537
Maintainer summary	2 405
Institution summary	11 192
School site summary	7 355

Learning environment at maintainer	783
Learning environment at school site	4 683
Student report	68 727
<b>Total</b>	<b>143 828</b>

### ***3.3 Policy initiatives***

(143) As an initiative to increase the effectiveness of system evaluation, in 2005 the development of a uniform sectoral quality policy, and as part thereof, the construction of a sectoral evaluation system began. Although the quality evaluation strategy described in Chapter 2 was not adopted formally, the thinking of the profession is still permeated by its findings and suggestions. Its greatest achievement was perhaps that it intended to connect the elements of the national and the institutional external and internal evaluation – which are still in operation, but fail to enhance one another’s effects – without limiting the current elbow-room of educational players. This strategy was the first to voice the need for the publicity of assessment data, which has since then, for the most part, been implemented. The strategy also suggested an idea according to which earnest sectoral evaluation requires that the development of a modern information system on the basis of the existing collections of data, but in full consideration of the connectivity of the different databases. The construction of the integrated information system has already begun.

(144) Another initiative to boost effectiveness is the priority development programme entitled “Comprehensive Quality Development in Public Education”, which is to be financed from the Structural Funds and is currently awaiting implementation. The plan of the programme was informally influenced by the concept of the quality assessment strategy, which was presented in the previous chapters. This is by all means beneficial in that the standardised concept formulated in the document provided guidance to the planners. The aim of the scheme is to increase the effectiveness, the quality and the efficiency of education, to develop and feed back well-grounded information on student assessment and school assessment for all educational players (especially for the central administration, for the school maintainers, for school developers, as well as for parents and students), to promote education development, and to improve the quality management systems in public education.

**Among others, the following tasks are foreseen under the development programme entitled Comprehensive Quality Development in Public Education:**

*Concerning the further development of the system of student assessment:*

- Extending regular and comprehensive student assessment to competencies in natural sciences.
- Ensuring the conditions for the periodic assessment of social competencies.
- Developing tools suitable for the assessment of reading and mathematics competencies, which are indispensable for the knowledge and learning activity on which lifelong learning is based in the case of students with special educational needs (students with special educational needs, national and ethnic minorities).

- Training and further training for professionals involved in carrying out the assessments.
- Processing assessment results, their second analysis for the purpose of development and aiding educational policy.
- The development of indicators based on assessment and examination results, preparing referent sections in public reports on efficiency.
- Training professionals involved in the administration of examinations and assessments.
- Further training for professionals in local governments and for heads of schools to facilitate the use of assessment results.

*Concerning the development of the system of schools' self-evaluation and that of external evaluation:*

- Developing and testing the standards (areas, criteria) and tools of maintainers' school assessment.
- Training for professionals involved in school assessment and creating the conditions for their recognition and participation.
- Developing and testing the standards (areas, criteria) and tools of schools' self-evaluation.
- Ensuring further training for heads of institutions and teachers involved in schools' self-evaluation.
- Further training for professionals helping with school development programmes (mentors) based on schools' self-evaluation.
- Developing a framework for the content of school development programmes to be effected subsequent to schools' self-evaluation.

*Concerning information management and feedback:*

- Building the system of indicators in public education, construction of a management information system to serve the purposes of planning and development.
- Developing training for professionals in public administration as well as for school maintainers and heads to facilitate the use of information that is fed back by the quality assessment system.
- Preparing annual and periodic public reports on the quality of public education and improving the capacity of analysis required for this.



## Chapter 4: School assessment

(145) One of the fundamental characteristics of the Hungarian system of educational administration is that the direct administrative powers are fairly limited at the country level, and that the minister's powers are dominated by regulatory and developmental duties. Since in Hungary there is no uniform, standardised evaluation system in place – which would be operated by an education inspectorate established for this purpose –, evaluation competencies are strongly tied to control competencies, and these in turn are nearly exclusively exercised by the maintainers (typically local and county governments) of educational institutions. The activity of schools' maintainers is primarily characterised by legality and financial control instead of school assessment. The internal assessment system of education institutions developed as self-evaluation gradually gains ground, which is the basis of quality development.

(146) In Hungary, the assessment activities pursued at different levels and for different purposes are not integrated into a single, institutionalised and standardised national evaluation system. Accordingly, as regards the organisations and the persons carrying out assessments, Hungary is dominated by diversity in terms of the criteria, the methods of assessment and the use of results (National Dossier on Education).

### 4.1 Current practices

#### 4.1.1 Overall framework for school assessment

(147) The school assessment system comprises both schools' self-evaluation and external evaluation by the maintainer. Hungary is one of the few countries where in public education there is no regular external qualitative assessment meeting the standards of and controlled by the profession (*Halász, 2004*). The assessment of the professional work of public education institutions is the task of maintainers as stipulated in the Public Education Act<sup>16</sup>, which also defines the range of tools<sup>17</sup> that can be applied during in the course of such activities. In the Hungarian regulatory environment, much depends on how local governments can cope with their maintainer duties, and at what standard they perform the tasks related to school assessment. As there is no guarantee that in each school a school assessment of an acceptable standard will take place at specific intervals, the quality of public education cannot be ensured and continually maintained. It is for this reason that the amendment of the Public Education Act in 2003 stipulates regular maintainer control (at least once in four years), which covers schools' financial management, the legality and efficiency of their operation and the effectiveness of education. The amendment of the Public Education Act, which has been in force since 2005, greatly added to the weight of maintainer assessment in that it requires maintainers to publish the results of the assessment of teaching institutions on their homepages (if they do not have a home page, then in the customary manner).

(148) The amendment of the Public Education Act in 2003 provided that all nursery schools and schools work out their own system of quality development and that this be laid down in a separate document approved by the maintainer (school level quality management programme). Regulation of quality was previously included in the school level “pedagogical

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<sup>16</sup> Article 102 (2) (g) of Act LXXIX of 1993 on Public Education

<sup>17</sup> Article 104 (4)

programme”, however, after the amendment came into force it constitutes a separate public document. In the case of schools that are maintained by a local government, the quality management programme of the institution must be in line with the quality management programme of the local government. This means that the amendment effected changes also in the educational administration activity of local governments, since they were expected to draft a quality management programme for the local government (which schools had to keep to). The quality management programme of local governments defines maintainer expectations for the entire local public education system managed by the local government, the tasks of specific institutions with regard to maintainer expectations, the connection between the public education system and other sectors affecting public education – child and youth protection, social policy, labour management, general public education, healthcare –, and the rules pertaining to the monitoring of teaching and educational activities, as well as professional, legal and financial control, which are planned as part of maintainer control.

(149) School maintainers other than the state or local governments do not prepare a quality management programme; however, they must perform the monitoring and assessment tasks that are part of maintainer control. In their case, it is the notary public or the chief notary issuing the operating permit who monitors the legality of maintainer activity, and within the framework of thematic surveys the notary examines whether the institution operates according to the conditions laid down in the operating permit.

(150) An important element of the policy aimed at quality development and assurance is the provision of institution-level guarantees for quality development and assurance. Institution-level quality assurance rests on the approach that one of the most important benchmarks of quality is the satisfaction of the users of the service. The issue of quality became a priority area of Hungarian public education policy in the 90’s. One reason is that the control and quality assurance mechanisms formerly operated in the centralised education system disappeared with decentralisation or became insignificant and could therefore no longer fulfil their function. The definition of control, assessment and quality assurance was extended as a result of the amendment in 1999, and quality assurance was included in the Public Education Act<sup>18</sup>, so legal regulation also confirmed that one of the major objectives of the central administration was the creation of quality assurance systems at the institutional level. In order to achieve its goals in the field of quality development, the Ministry of Education launched a development programme in 1999 entitled “Comenius 2000”, established a programme office to organise this programme and to facilitate and coordinate the quality development and quality management activity of public education institutions and maintainers, and provided considerable targeted support to encourage the implementation of local (institutional) quality assurance systems. The aim of quality development in public education was to guarantee that education and teaching institutions provide services that meet social and local needs.

<i>Levels and models in the Comenius 2000 Quality Development Programme in Public Education</i>		
<b>Model</b>	<b>Institutional level</b>	<b>Maintainer level</b>
I	Partner-centred operation	Dialogue and consensus

<sup>18</sup> Act LXXIX of 1993 on Public Education

	Institutions perform self-evaluation in cooperation with their partners, and develop their activity on the basis thereof	Maintainers analyse their relationships in cooperation with their partners, and make plans on the basis thereof
II	Implementation of full-scale quality management  Institutions introduce one of the standard quality assurance models	Full-scale quality management and cooperation  Maintainers pursue internal organisation development, and apply one of the standard quality assurance models
III	Propagation of quality development  Institutions help other institutions develop their own quality assurance system	Creation of a stimulating environment  Maintainers help quality-oriented operation to gain ground, apply incentives that serve this purpose, and cooperate with other maintainers
Source: Comenius 2000, 1999		

(151) Following the change of government in 2002, the government introduced new elements of forms and contents for the development of quality assurance programmes. The measures primarily sought to resolve the monopoly of the Comenius 2000 programme, allowing other quality and institution development models to be accredited, encouraging the dissemination of good practice, among others by drawing on the experience and results of the Comenius 2000 programme, but involving other operating quality development models as well. Furthermore, as mentioned before, all education institutions were required to build their own quality development system, and to define this in a document approved by the maintainer.<sup>19</sup> This document is suitable for guiding the assessment activity of institutions, particularly for the reason that a subsequent amendment<sup>20</sup> specified its content and explicitly stated that monitoring, evaluation and assessment tasks must be planned and implemented. The quality management programme is a public document, its implementation is evaluated annually by the teaching staff and the parents' community, the outcome of this evaluation is sent to the maintainer and is published in the customary manner. The quality policy of the institution and the quality development system operated by the institution must be described in this document.

(152) The head of a public education institution is responsible for the performance of monitoring, assessment and evaluation tasks and for the operation of the quality management programme. The teaching staff of the institution has the powers to decide on the adoption of school assessments and analyses. The specialist working panels operating in schools and nursery schools provide assistance with the performance of assessment and control tasks. The school panel (teachers', parents' and maintainer representatives) also contributes to maintainers' assessment in that its opinion serves as a source for assessment.

<sup>19</sup> Articles 40 (10)–(12)

<sup>20</sup> Article 40 (11) of Act LXXIX of 1993 on Public Education

#### 4.1.2 School assessment procedures

(153) The current system of school assessment took its form as a result of a two-decade process. In the first half of the 80's dissatisfaction with the rather centralised system of educational administration intensified. Consequently, the Education Act passed in 1985<sup>21</sup> strengthened the professional autonomy of education institutions in many respects. Besides the measures serving this purpose, the Act – as mentioned before – eliminated the former public education inspectorate, which was authorised to appraise the educational and professional activity of the institutions and the work of their management, and to exercise professional control over them. It also terminated the specialised inspectorates that were organised according to specific subjects and whose purpose was to monitor the work of teachers, and eliminated the network of education and specialised inspectorates, which executed these duties. In other words, it terminated the entire system of educational inspection. Educational inspection was replaced by the network of County Educational Institutes, which basically provided consultation and certain support services. As there was no other mechanism for the assessment of education institutions, as a result of this change, external control over the educational and teaching activities of schools in fact ceased to exist, with only legality and financial control having been in place (National Dossier on Education).

(154) After the change of the political regime, a new system of educational administration was created through the comprehensive legal re-regulation of education in 1993 (Act LXXIX of 1993 on Public Education). The system that came into being at the time was adapted to the extremely decentralised system of public administration, which ensured the autonomy of local municipal governments to the highest degree. Accordingly, the responsibility for securing education services was assumed by local and regional (county) governments, and local governments became the owners of education institutions. Simultaneously, the network of denominational and private schools was developed and expanded and the ratio of education institutions maintained (owned) by entities other than local governments reached 10 percent. All these led to a situation where local governments adopted an extremely important role in the monitoring and assessment of the education institutions they maintain.

(155) The setting up of the National Centre for Assessment and Examination in Public Education (OKÉV) in 1999 was an important step as mentioned in Section 2.1. With the establishment of the new administration authority, the state examination system and the system of student assessment were brought under unified control. In addition, the establishment of OKÉV allows the central educational administration to directly monitor the professional activities of education institutions that are maintained by local governments. OKÉV became the national agency that is to operate the mechanisms that serve the evaluation of education, such as the National Register of Experts.

(155) The amendment of 1993 defined the evaluation of the teaching and educational activity of education institutions as a task to be performed by independent experts in public education and stated that only those can engage in such activities who are listed in the National Register of Experts. Candidates can be enrolled in the register under calls for applications and if they fulfil the basic requirements (bachelor or master degree and qualification required for holding a teaching job, specialist examination in teaching, and at least ten years' experience in education or teaching).

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<sup>21</sup> Act I of 1985 on Education

(156) The relevant statutory provisions do not stipulate any regular evaluation of teaching and educational activities. Nonetheless, the Act defines the scope of those who can initiate evaluation, if the related expenses are covered, according to the following scheme:

- at country, regional, county levels and in Budapest: the Minister of Education, and for vocational education the minister responsible for the specific vocational qualification,
- at county level and in Budapest: the county government and the City Council of Budapest,
- at municipal level: the local government of the village, town, town of county rank and local governments of the districts in Budapest,
- at institution level: the maintainer, the head of the public education institution, an employee of the public education institution.

(157) At least seven days before the commencement of the evaluation, the expert performing the evaluation (or heading the evaluation) must agree on the duration, form, methods and the date of evaluation with the head of the public education institution and the initiator of the exercise, and they must also agree on the way stakeholders can express their opinion on the findings of the evaluation<sup>22</sup>. In the case of national, regional, county level evaluations or those undertaken in Budapest, the maintainer of the public education institution must be notified at least seven days before the evaluation begins, and must be informed so that the maintainer can attend. If the evaluation takes place in a public education institution which performs tasks related to the education of national and ethnic minorities, it can only be headed by an expert who speaks the language of the given national or ethnic minority, and the national minority self-government concerned must be notified of the evaluation and is entitled to delegate a representative to attend.

(158) The findings of the evaluation are sent to those concerned, to the entity initiating the evaluation and to the maintainer of the given institution. If the evaluation takes place in a public education institution which performs tasks related to the education of national and ethnic minorities, the findings of the evaluation must be sent to the given local minority self-government and the national minority self-government. Anyone objecting to the findings of the evaluation can request a review in the form of another evaluation. If necessary, following the assessment, the maintainer – if not authorised to act himself – calls on the head of the institution to take the necessary steps within a reasonable timeframe.

(159) The aim of the first major targeted government programme, the Comenius 2000 programme – which was launched in 1999 and based, on the one hand, on the former Hungarian pilot programmes that served the development of institutions' internal (self-) evaluation practices and, on the other hand, on foreign experience gained during the application of the EFQM model – was to support the dissemination of institutional quality assurance systems (see Section 4.1.1). The quality management programmes launched in 1,700 institutions rested on self-evaluation, which was carried out with the help of external consultants. The amendment of the Public Education Act in 2003 mandated the development and operation of a quality development system in all Hungarian education institutions.

(160) The legal background of institutional quality assurance and development was created by the decree promulgated by the Minister of Education in 2002<sup>23</sup>, the scope of which – irrespective of the maintainer – extends to all public education institutions. The decree

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<sup>22</sup> Article 107 (3) of Act LXXIX of 1993

<sup>23</sup> Decree No 3/2002 (II. 15.) OM of the Minister of Education on the Quality Assurance and Quality Development of Public Education

specified the tasks of quality development and established the “For the Quality of Public Education Award” to acknowledge the achievement of institutions that performed outstandingly well in this field. The decree stipulated that all public education institutions must continually pursue quality development activity based on self-evaluation. This mission is assisted by the National Centre for Assessment and Examination in Public Education, which issues relevant guidelines presenting organisational and methodological solutions to all public education institutions. The decree is not limited to the regulation of institutions’ tasks; it also specifies national quality development tasks, primarily within the framework of professional assistance. These are, among others: the drawing up of methodological materials, compilation and maintenance of the list of quality development consultants (institutions can use the services of quality development consultants to execute their quality development tasks), and the organisation of training and further training courses in quality development.

(161) The first student assessment programme which not only served the objectives of education policy but also those of the specific education institutions began in 2001 in the form of the National Assessment of Basic Competencies detailed in earlier chapters. Each education institution was provided with the means by which institution level assessment results could be obtained and processed, hence the survey became convenient for school assessment. Furthermore, national and regional results as well as results by school type served as an objective point of reference for schools’ self-evaluation.

(162) Up until 2005, the secondary school leaving examination, which concludes secondary school studies, was not standardised. In 2005 the two-tier secondary school leaving examination (ordinary and advanced level) – which is based on standard requirements – was introduced and this examination also allows students to gain admission into higher education institutions. At the same time, the entrance examination, which formerly governed admission into higher education institutions, was abolished. The new, standardised secondary school leaving examination is capable of providing feedback to secondary schools on the effectiveness of their work. (For more details on the two-tier secondary school leaving examination see Section 6.1.2.)

#### **4.1.3 Competencies to assess schools and to use assessment results**

(163) School assessment, as mentioned, can be performed by only those who are listed in the National Register of Experts – this is the most important rule that guarantees expertise in the performance of assessments in Hungary. Experts who take part in the preparation of maintainer decisions on the establishment, re-organisation and termination of an institution or perform professional tasks related to equal opportunities must attend fee-paying training courses in educational administration, which are organised by the Educational Authority annually to allow for the on-going monitoring of changes in legislation and help experts update their expertise.

(164) Experts can pursue their professional activity in the entire country. They must keep records of their professional activity, in which they must state the name of the person or entity requesting the service, the subject and date of the request, the date of preparing the expert opinion and data based on which the remuneration and the reimbursement of expenses can be calculated. Experts present their opinion in writing or orally, as defined in the request. The written opinion includes the personal data of the expert, a description of the subject of the

request, the findings by the expert, the conclusions drawn, the proposed actions, and anything the expert deems important. Experts are liable to keep the facts and data they have access to in the course of their work confidential. Experts are entitled to remuneration and a reimbursement of their expenses in exchange for their work. The rate of the remuneration and reimbursement is established by the person requesting the service in compliance with the provisions of the relevant decree and on the basis of the data prepared by the expert.

(165) With regard to the competencies possessed by the specific institutions for interpreting assessment results and for effecting changes and development in view of these results, more or less the same can be said as in the case of system evaluation (see Chapter 3).

#### **4.1.4 Using school assessment results**

(166) The vast majority of Hungarian teachers are not yet proficient in using assessment and evaluation results or integrating these into their everyday practice. Professional services need to be strengthened in order to develop these skills, and in addition to improving the external professional support they receive, teachers must be prepared for this task.

(167) The Educational Authority, as part of its mandate for public education, sends the results of the national assessment and evaluation to every maintainer and is liable to warn the maintainer if, based on the results, it is required to take steps in any of the schools. If the educational activity in the given school fails to achieve the minimum standard specified in the relevant piece of legislation<sup>24</sup>, the maintainer must instruct the headmaster of the school to prepare an action plan. The school must send its action plan to the maintainer within three months from receiving the notice of the maintainer. The action plan becomes valid once approved by the maintainer. When preparing the action plan, the reasons which led to the failure to meet the required standard of educational activity must be revealed. The action plan must identify the measures that are necessary for the elimination of the causes revealed as well as the school development programme required for the implementation of the plan. The action plan must also contain the measures which can guarantee the appropriate standard of education until the action plan is implemented. If the results of the national assessment in the third year from the notice indicate that the school yet again fails to meet the minimum standard defined in the relevant piece of legislation, the Educational Authority, as part of its mandate for public education, calls on the maintainer to prepare an action plan within three months. The maintainer is required to prepare and implement the action plan in cooperation with an educational servicing institution, expert or other professional organisations as defined by law. The action plan becomes valid once the Educational Authority approves it as part of its mandate for public education. The Educational Authority monitors the implementation of the action plan within the framework of a thematic survey.

## ***4.2 Implementation of school assessment***

### *External assessment*

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<sup>24</sup> The precise definition of the minimum standards is contained in Decree No 3/2002 of the Minister of Education, the so-called Quality Decree.

(168) Local governments were required to draft their quality management programmes (QMP) in 2004. On average, out of three local governments two employed the services of an expert to prepare their QMP document (Local government survey, 2007). The QMP of local governments must, among others, contain the rules pertaining to maintainer control and assessment. Although the Public Education Act stated from the beginning, i.e. from 1993, that school assessment is the duty and responsibility of the maintainer, it was virtually unknown how maintainers officially complied with this obligation. However, the amendment in 2003 stipulated that local governments were to record their activity with regard to school assessment in their QMP. This means that assessment can no longer be performed in an ad hoc manner, local governments must elaborate on details (in what areas, based on what data or other information and how often, and perhaps also from what resources – including human and financial resources) concerning how they pursue such activity.

(169) Maintainers have a relatively broad elbow-room in preparing their assessment of educational and teaching activity, at least in terms of methodology. The outcomes of a local government survey in the autumn of 2007<sup>25</sup> reveals that the majority of maintainers build their assessment of professional activity (also) on schools' self-evaluation. Both before 2004 and after the quality management programme was prepared, this was the option most of the respondents chose as a source used for the assessment of schools' educational activity. There has been no change in the ranking, this has been and remained the first option.

(170) However, considerably marked differences can be seen in what they regard to be important when they attempt to judge the effectiveness of a school. Local government maintainers tend to rank certain criteria very similarly, but there are criteria that diversify the respondents. For example, 'Excellent indicators of further studies' constitute a criterion which the majority holds to be very important, whereas based on the answers the 'ratio of applications (over quota)' seemed to be the least important item to many respondents. The majority considered parent satisfaction and the development of the educational level to be moderately important, and although 'levelling of the differences in students' opportunities' and the 'low rate of dropout' appeared to be averagely important, these criteria equally received all kinds of rankings. This demonstrates that these are the problems and situations with which certain schools and maintainers have to cope in Hungary these days, whereas in other schools the idea that the school could be judged based on its performance in this field does not even surface.

(171) Another typical difference is that the number of assessment criteria on the basis of which the specific local governments assess the professional performance of their institutions has increased. While before 2004 respondents cited 5.2 criteria on average, the assessment system governed by the QMP of local governments contains 6.1 criteria on average. In respect of both periods, it is very rare that maintainers carry out the assessment only based on one or two criteria; applying 6 to 8 criteria at a time is more general.

(172) Pursuant to the regulation currently in effect, the quality management activity of local governments does not come to an end with the preparation of their own programme, since they are also responsible for ensuring that the quality management programmes of the schools they maintain are in conformity with the QMP of local governments. Deciding on this issue is often not at all a trivial professional task, it is therefore an important question whether local

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<sup>25</sup> Local government survey 2007. Institute of Education Research and Development



governments perform this task by themselves or employ the services of an expert for this purpose. Looking at the data of the research referred to above it can be established that out of three local governments two consult an expert. Among these local governments there are many that have entrusted an expert with the preparation of their QMP, too. Three quarters of the local governments that invited an expert to assist them have had their school quality management programme assessed by an expert, while in the case of those local governments that have prepared their documents themselves this ratio is under 50 percent. It can thus be rendered probable that a good part of maintainers contracted an expert for the assessment of the school's QMP too, in addition to the local government QMP.

(173) With respect to the activity and the opinion of towns with county rank (being one of the largest group of maintainers of public education institutions) in this regard,<sup>26</sup> it has been revealed that they invited an expert to prepare the QMPs of local governments almost without exception (citing scarcity of time as a reason). At the same time, maintainers who have already had some practice in school assessment sought to legitimise their existing practices in this document, with some minor amendments. They believe that the greatest benefit of the programme itself was that it set out the maintainer's actions clearly, in precise detail, showing a clear picture for all. Having analysed these documents it can be concluded that educational managers are right in assuming that the expectations towards maintainers no longer plainly mean the supervision of legal operation. Despite this, inspecting and assessing professional activity normally does not go beyond a detailed explanation of the assessment, and, in the majority of cases, assessment is mentioned as an act that is based on institutions' self-evaluation. Institutions prepared various kinds of quality management programmes that, among others, differed from one another in the extent to which they departed from the traditional form of control, which focused on educational documents. This could be well facilitated if they applied a comprehensive approach to strategy and institution development.

(174) Pursuant to the Act on Public Education, the regular assessment of the effectiveness of schools is the duty of maintainers. The relevant passage was introduced to the Act in 1996, and it is extremely interesting that in the autumn of 2007 16 percent of the respondent local governments<sup>27</sup> said that they did not assess their schools regularly, which in fact meant that every sixth maintainer local government failed to adhere to the statutory provisions. Considering the fact that in 2004 each and every local government was required to draw up a Quality Management Programme (QMP) in which the assessment had to be planned, this is even more interesting.

(175) Pursuant to the Act on Public Education, maintainers are liable to publish on their homepage (in the absence thereof, in the customary manner) their assessment of the teaching institution. It was pointed out before that merely one sixth of local governments fail to assess the performance of their schools regularly. However, out of those that do so, 90 percent only publish the assessment results. In such cases publicity has more bearing than simply attesting that local governments have fulfilled their duty. As in the case of every public service, civil control should be assigned an important role also with respect to education. This, however, can only be realised if those interested can access the data that describe institutions' work. Parent organisations, the school panel but also ordinary constituents have the right to know whether the institutions funded by their taxes operate in an effective way. At the same time, civil control can be a benefit for schools, too: if they pay attention to the needs and

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<sup>26</sup> Research 'Education Policy of Towns of County Rank', National Institute of Public Education, 2005

<sup>27</sup> Local government survey, 2007. Institute of Education Research and Development

observations of ‘school users’, they can develop the school jointly into an institution that can be accepted by both parties.

(176) Research data show that this publicity in the majority of the cases merely means that the body of representatives receives the results, and/or those interested can check them out at the local government office. 45 percent of the respondents indicated that the assessment or a summary thereof was published in the local newspaper; yet, this is barely one third of all respondents. The website of the local government represents a somewhat smaller publicity than the local media, but it can still reach a relatively broad spectrum of the public; one quarter of the assessors choose this type of publicity, which is slightly less than one fifth of the total scope of respondents (i.e., the sample comprising all Hungarian local governments that are school maintainers). Apart from the 4 options considered, one fifth of the respondents also resort to some other kind of channel, but there was no local government where neither one of the four forms of publicity was used.

(177) The most obvious method of assessing schools’ efficiency is the use of some objective benchmark, with the help of which a maintainer of several schools can compare the institutions under its maintenance with one another, but this also helps maintainers of a single school to benchmark the performance of the schools against some desirable standard or norm, or the country average. Absolute efficiency is always much more difficult to assess than relative effectiveness. Besides making the measurement of effectiveness objective, various assessment results also influence expectations. Altogether 17 percent of the local governments interviewed during the 2007 survey claimed that they did not take into consideration assessment results when evaluating the professional activity of the institutions they maintain. However, four out of five maintainers take into account the results of assessments. This ratio should not go unnoticed also for reasons of objectivity and comparability, and it is probable that the direct and simple availability of an increasing amount of data (for example, in the case of the National Assessment of Basic Competencies) is another contributing factor in that a relatively high ratio of maintainers rely on student assessment. Every sixth local government performs an assessment on its own. The existence of such assessments is closely related to the type of municipality: while these are customary in every fifth town, only one eighth of villages carry out such assessments. Yet it surpasses our expectations that more than two thirds of the assessments undertaken by local governments take place in villages. However, there is a strong relationship between the nature of the assessment and the type of the municipality. Villages are much more likely to use one type of assessment or means of assessment, whereas more than half of the towns apply various tests or the tests actually used have sections and questions to measure both subject knowledge and competencies. In general, it can be said that the assessments carried out by local governments typically cover primary schools, and more specifically the upper grades thereof.

(178) On the whole, more than half of the maintainers assign primary or considerable importance to assessment results. The majority relies on national assessment results: 84 percent of the respondents reported so. Out of six respondents one claimed to have chosen the assessment of the local government, nevertheless, even in these cases it is infrequent that the maintainer only uses its own assessment to appraise its schools; this practice is typical of no more than 3 percent of the respondents. 70 percent of those using some kind of assessment results in their evaluation, at best consider the assessments of the institutions themselves, apart from the national surveys. Nearly half of the local governments only make use of the results of one type of evaluation for their school assessment, and this single evaluation tends to be the National Assessment of Basic Competencies.

(179) In general, many new elements have been added to the regulation of maintainers' assessment activity over the past years. The areas and tools of maintainer assessment and control are clearly specified and the pertaining regulation precisely identifies the responsible entities and the procedures as well. However, the process is impeded by the fact that at times maintainers are not able to hire experts due to financial reasons. Under the current financing system, it is only town and county governments maintaining large networks of institutions that can continuously pursue assessment activities. Their focus is primarily on the monitoring and assessment of the institution's activity, it is less typical for them to evaluate the whole set of public services. The options of smaller municipalities are rather limited, they are struggling with the lack of expertise, resources and professionals. Evaluation of the activity of education institutions' management is not characteristic of the assessment practice of maintainers. Most of the time, maintainers perform their school assessment with the help of schools' self-evaluation, which is essentially based on the reports of the institutions. Maintainers are less likely to use the results of central and local assessments – which provide an overview of the fulfilment of the expectations defined in central and local requirements – and examination results. An increasing number of local governments are becoming familiar with and using assessments that are based on parent satisfaction, which indicates that the partner-oriented approach is gaining ground.

#### *Internal evaluation*

(180) The traditional and prevalent forms of institutions' internal evaluation are associated with the periodic reporting obligations of institutions and institution heads. The content of internal evaluation was renewed in the middle of the 90's, when institutions had to assess their own activity to create their "pedagogical programmes" and to develop their own professional and educational profile. In addition, every education institution was required to draft a plan for in-service teacher training, which entailed an assessment of the professional competencies of teachers to ensure that teachers possessed the appropriate qualifications to implement the school programmes. Under the traditional procedures of internal evaluation, assessments were performed by the heads of schools or at times the heads of the specific departments. The most common form of this is the appraisal of teachers' work by way of classroom observation and subsequent discussions. Institutions which already have a quality management system in place generally use SWOT analyses, interview the parents and students and survey their degree of satisfaction in some simple way – mostly with the help of questionnaires – to perform the internal evaluation of educational work.

(181) The amendment to the Public Education Act of July 2006 synthesises and consolidates the former internal evaluation activities and methods. Full-scale self-evaluation, its frequency and methods as well as its correlation with the quality management system of the maintainer are compulsory elements of the quality management programmes of institutions. On the one hand, the programme provides that national assessment and evaluation results must be taken into account when implementing the institution's quality management programme; on the other hand, it defines the criteria applied to the appraisal of those holding a teaching position and the rules of the appraisal. In addition, institutions must evaluate the implementation of the quality management programme biannually, and, on the basis thereof, should identify measures that ensure that the professional objectives of the institution are in accord with its operation and achievements.

(182) Institutions perform their self-evaluation in accordance with the provisions of their quality management programme. Checking this is the maintainers' competence and they are just as much responsible for verifying this as they are in fact responsible for the effectiveness of the work of the institution. Based on research data<sup>28</sup>, three quarters of schools use some kind of student assessment in addition to the National Assessment of Basic Competencies to facilitate the evaluation of their institutions' work and to improve their results. Most of the time, schools themselves perform an internal evaluation; this option was reported by two thirds of the responding schools, but half of the institutions are also provided with the results of some kind of an external evaluation initiated by the school or the maintainer.

(183) Besides student performance data, other school-level performance indicators can also be applied to evaluate the municipal, regional education systems or the education systems of the institutions. In Hungary, the most well-known of these indicators are generated from the ratio of students of the school who undertake further studies (ranking of schools on this basis), the results of the written secondary school leaving examinations and the places won in competitions. Added-value type performance indicators can also be computed from the aggregate data of schools. Institutions and maintainers were both eager to use former school rankings that were based on the ratios of students pursuing further studies. The annually published brochure which reports data on all Hungarian secondary schools is widely known. At the same time, there is an increasing number of people who, from a professional point of view, strongly dispute the validity of indicators described as such, so school rankings are not published any longer and data reporting analyses relying merely on performance indicators are gradually replaced by those based on complex indicators of efficiency.

#### ***4.3 Policy initiatives***

(184) In the field of school assessment, it is undoubtedly the publication of results that qualifies as the initiative with the greatest impact. According to school headmasters<sup>29</sup>, the publicity of assessment data is the most useful data for education researchers, but nearly 80 percent of them believe that it is beneficial for the heads of institutions and teachers alike. In their opinion, publicity is the least useful for the broader public: roughly every tenth headmaster disagrees with the idea that anyone interested should be able to access these results.

(185) Another change in a similar field is that schools failing to achieve the minimum level of performance in the National Assessment of Basic Competencies are required to take measures. The way this element was included in the regulation is rather interesting in that in the first year underperformance only implied a possibility of applying for extra funds rather than being an obligation. This was a result of the fact that even before the amendment, the Ministry intended to encourage these schools to make efforts to improve their results. Schools were able to carry out developments from the funds awarded to them through tenders. From the next year onwards, however, the preparation of an action plan was no longer an option but an obligation, and the passage added to the Act – in a certain spirit of accountability – sought to ensure that the quality of education met a certain standard everywhere. The Education and

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<sup>28</sup> School survey – Institute of Education Research and Development

The survey was carried out on a representative sample of 1000 cases in March 2009 with the involvement of the heads of primary and secondary education institutions.

<sup>29</sup> School survey 2009. Institute of Education Research and Development

Opportunities for Children Roundtable formulated a rather outspoken opinion with regard to this amendment: “The legislative work related to the assessment and evaluation system is characterised by impatience and unjustified hyperactivity. While the Hungarian system is not yet mature enough, and there is hardly any adequately appraised experience in connection with its operation, an increasing number of professionally ungrounded, ad hoc ideas emerge among politicians as to how assessment results could be reported back as fast as possible in order to evaluate schools and how schools that perform poorly should be sanctioned. This is an utterly wrong direction.” (Kertesi 2008, 185.p)

## **Chapter 5: Teacher appraisal**

(186) Until recently, there was no central regulation governing teacher appraisal. Nonetheless, the majority of institutions applied some sort of an evaluation system in relation to teachers' work, as this is an element in most quality assurance systems. These individual, institution-level appraisal systems are generally performance assessments, which are based on teacher activity and focus on teacher development. Institutions could define the period of appraisal at their own discretion, and could give effect to their specialty when developing their assessment systems.

(187) In the past few years two major changes took place. On the one hand, the amendment to the Public Education Act stipulates that institutions' quality management programmes should include criteria related to teacher appraisal and also defines the rules of the appraisal procedure. This amendment was to be effected by the beginning of the 2009/10 academic year. On the other hand, the majority of teachers teaching in schools run by the state or a local government qualify as public employees. Their work is governed by the Act on Public Education and other legislations on education, for example by the decree regulating the operation of educational institutions. However, certain aspects of their employment are governed by the Act, which in general addresses the legal status of public employees. The text of the latter Act was last modified in 2008, with the addition of a description of the classification of public employees. This obviously brought about changes also in the system of teacher appraisal, yet schools' freedom in teacher appraisal still remained considerably significant.

### ***5.1 Current practices***

#### **5.1.1 Overall framework for teacher appraisal**

(188) Institutions' quality management programme defines the long-term principles of operation and the concepts that are to serve its implementation. Institutions' QMP must determine the process of operation, and, within this framework, the methods management, planning, monitoring, assessment and appraisal tasks are executed. The QMP should also set out the criteria applied to the appraisal of those fulfilling managerial duties in the institution and those employed as teachers, and should define the rules pertaining to the appraisal.

(189) The December 2008 amendment to the Act on the legal status of public employees<sup>30</sup> defines the cases when the classification of public employees is compulsory and also discusses related possible outcomes. In the case of teachers, the classification of public employees involves teacher appraisal. Appraisal can conclude with the classifications of: exceedingly qualified, qualified, less qualified and not qualified. It is mandatory to perform the appraisal if someone is promoted, fills an executive post, earns a title, if there is a complaint concerning his or her work or when the person becomes entitled to salary supplement for his/her outstanding work.

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<sup>30</sup> Act XXXIII of 1992

## 5.1.2 Teacher appraisal procedures

(190) Schools can freely determine the criteria of teacher appraisal. However, evaluation of the criteria selected is strictly regulated and defined in a piece of legislation<sup>31</sup>. For each criterion, scores of 0, 1, 2 and 3 can be awarded to appraise teacher performance, where 3 points are given for outstanding work and inadequate performance merits zero points. The results of the appraisal are calculated in terms of the percentage of actually awarded points relative to the maximum score. Eighty to hundred percent means exceedingly qualified, sixty to seventy-nine percent means qualified, thirty-five to fifty-nine percent means less qualified and below thirty percent the public employee concerned is classified as not qualified. Public employees are also classified as not qualified when their performance is inadequate based on at least one criterion.

(191) Appraisal also has a bearing on the salary. According to statutory provisions, if a teacher passes a specialist teacher examination, he or she should be classified into a higher salary category. The salary of teachers classified as inefficient cannot be reduced, yet their dismissal can be initiated on grounds of professional incompetence. (It is very difficult to prove professional incompetence, especially in a potential labour dispute in court, so very few Hungarian schools resort to this option.)

(192) In practice, irrespective of the type of employment, institution heads are liable to produce an assessment on the teacher's work if so requested. Legislation allows both public sector workers and teachers employed in the private sector to request an appraisal of their work from the headmaster upon termination of employment. Headmasters may not refuse to issue such appraisal.

(193) The criteria of appraisal can vary from institution to institution. Nevertheless, public documents show some similarities. One probable reason for this is that, although there may not be a single set of criteria throughout the country, the majority of consulting companies operating in the public education service sector have their own inventory for teacher appraisal. The criteria often include student performance, the teacher's subject and pedagogical knowledge, the teaching performance observed, and attendance of in-service training courses. The methods often extend to classroom observation, interviews and obtaining students' opinions.

(194) As mentioned earlier, teacher appraisal is mandatory if a salary supplement is awarded for outstanding work. Many appraisals were produced on such grounds over the past few years, as maintainers have been able to apply for extra support under calls for tenders from the Performance Motivation Fund<sup>32</sup> since 2007. The general aim of the call was to acknowledge the appraisal activity of public education institutions. Another goal of the call was to explore how the assessment of those filling managerial positions and those in teaching positions was implemented in the quality management programmes introduced in the 2004/05 academic year and in the given schools' practice, and how – as a part of their self-evaluation – institutions operated the teacher or employee appraisal system and whether it was in line with maintainer expectations.

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<sup>31</sup> Government Decree No 138/1992

<sup>32</sup> Pursuant to Decree No 11/2008 of the Ministry of Education and Culture. This fund is managed by the Ministry, support can be applied for to cover the salary supplement and the related contributions of teachers performing outstanding work.

(195) The call awaited tenders from those school maintainers whose institutional quality management programmes were tangibly in concordance with the maintainer's quality management programme, with the institution's QMP including the rules of the teacher appraisal procedure in line with the conditions defined in the call, and with the operation of the institution being documented at least as of the 2006/07 academic year onwards.

### **5.1.3 Competencies to appraise teachers and to use appraisal results**

(196) The selection, work schedule, remuneration and appraisal of teachers employed by schools are the responsibilities of the school headmaster, acting as the person exercising employer rights. Certainly, the QMP can regulate teacher appraisal in a way that it also involves others in teacher appraisal in addition to the headmaster. For example, a frequent solution is to involve the head of the department concerned<sup>33</sup>. The appraisal can also be carried out by external actors, in cooperation with experts enrolled in the National Register of Experts.

### **5.1.4 Using teacher appraisal results**

(197) Tenders submitted for support from the Performance Motivation Fund were only accepted if the head of the institution consented to making the documents of the winning tender public in order to disseminate good practice. The aim of publishing good appraisal practices is to show institutions' valuable examples of the various appraisal solutions from among the practices applied by institutions having submitted successful tenders to the Performance Motivation Fund. Such calls have been announced annually by the Ministry since 2007 and it is since then that good practices have been published on the homepage.

(198) According to experience with tender evaluation<sup>34</sup>, the executive summaries of nearly half of the institutions with an excellent rating in fact reveal that the institutions have a long history of operating the appraisal system. In these 'pioneer' institutions, it was the introduction of the salary supplement due for outstanding work and the COMENIUS 2000 Quality Development Programme in Public Education – described in details in Section 4.1.1 – that inspired institutions' consideration of teacher appraisal. First, the criteria were specified, and in the majority of cases there were no written rules of procedure or assessment scales applied. The current system in these institutions is the result of development efforts spanning over several years. Another group of institutions basically launched their appraisal systems when the related statutory obligation arose. They used the experience of other institutions in adopting their practice. In a few cases, exchange of experience and inter-institutional cooperation were typical.

(199) Good practices in appraisal, among others, include the following:

- Complete system descriptions

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<sup>33</sup> It is a common practice in Hungarian schools that the teachers of various subject types organise themselves into groups, for example, the teachers of subjects in natural sciences, foreign language teachers, etc. Such groups are called departments, and these departments can enjoy a kind of autonomy within the school in respect of issues related to their specialty.

<sup>34</sup> Available on the homepage of the Ministry of Education and Culture



- Description of the appraisal section of the institutional QMP
- Assessment and appraisal methods, tools and indicators
- Rules of procedure, criteria
- Experience related to introduction

### ***5.2 Implementation of teacher appraisal***

(200) According to research findings<sup>35</sup>, schools apply 7 different criteria on average to appraise teachers, most of the time using the experience gained during classroom observation, which was cited by 94 percent of school headmasters. More than two thirds of the schools still rely on teachers' performance measured in terms of the execution of joint educational tasks in the school, the results attained by students at competitions, the effectiveness of the remedial education of certain students, and peer evaluations. Research results show that the least opted-for pre-defined option of appraisal was extra-curricular professional performance (expert counselling, work as a member in a committee, obtaining an academic degree), even so this criterion is applied by 42 percent of the schools.

### ***5.3 Policy initiatives***

(201) The Budget Act of 2009 appropriates HUF 1,100 million (Performance Motivation Fund) to support local governments that run public education institutions, provided that the nursery schools, schools and boarding schools or dormitories they maintain have an appropriate quality management programme in place and the maintainer also operates a local governmental QMP. Another condition is that the parent association (community) should express its opinion on the QMP and that the local government body should evaluate it and, accordingly, should operate a teacher or employee appraisal system as part of its self-evaluation activity in the manner defined in the QMP of the public education institution. Support can only be disbursed as one-off salary supplement, which is due for outstanding work. The head of institution decides on the distribution of support among teachers, however, the minimum and maximum amount one person can earn is enumerated.

(202) One of the teacher unions (Democratic Union of Teachers) is quite determined in upholding the view – which is also available on their homepage – that they consider the salary item awarded for outstanding work to be an important element of the wage system, but reject any performance-based payment that lacks common consent and verifiable standards, in particular any endeavour that can lead to a possible decrease in the salary.

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<sup>35</sup> School survey 2009. Institute of Education Research and Development

## Chapter 6: Student assessment

### 6.1 Current practices

#### 6.1.1 Overall framework for student assessment

(203) As already detailed in Chapters 2 and 3, Hungary has been a regular participant of the surveys coordinated by the IEA and the OECD since the 70's. In recent years, results of the PISA, TIMSS and PIRLS surveys received the greatest publicity. The role of international student assessments was exceptionally important in informing educational policy because these raised awareness of the need for regular and systemic assessments. These assessments also contributed to changing the approaches to assessment and helped in spreading assessment techniques.

(204) The National Assessment of Basic Competencies, which has been addressed previously in detail, is the most significant means of assessment in the Hungarian system of public education. Upon its development, its methodology greatly relied on the methods of international assessments. At the beginning, its primary aim was to provide schools with feedback, with the help of which they could evaluate their work on a factual basis. The assessment should be objective and uniform for each and every school.

(205) Generally, examinations play an important role in assessing the efficiency of public education. Although their principal function is to assess and acknowledge students' achievements, they can deliver important feedback on the performance of a specific institution or the entire education system, for that matter. This is particularly true in the case of standardised examinations, the results of which are more objective and comparable. Hungary already had such standardised examination in place since 2005 as it was by then that, after several years of development, the reform of the secondary school leaving examination had come to maturity (see Section 4.1.2).

(206) Teachers use diagnostic assessments relatively rarely, and if so, these serve grouping decisions, i.e. the grouping of children according to the planned rate of progress, mainly in order to adjust education and teaching strategy to the specific groups and individuals. Formative and summative assessments, on the other hand, are frequent tools in schools.

(207) Teachers regularly evaluate students' achievements and progress by giving marks during the academic year and by assigning grades at the end of both the first semester and the academic year. Students' conduct and efforts are evaluated and rated by the head teacher of the class – after consulting the teachers teaching in the given class. Marks should be regularly reported to the students and to the parents of minors. Schools apply a scale of five grades (1–5) to assess and rate students' knowledge and use a scale of four grades (2–5) to evaluate and rate their conduct and efforts. Introduced in a phase-in system, since the academic year 2003/04 students in grades 1 to 3 receive textual evaluation both at the end of the semester and the academic year, and students in grade 4 at the end of the first semester, to describe if their performance is rated excellent, good or satisfactory or if they need remedial education, but during the academic year marks can be given in the initial stage of schooling as a means of formative assessment.

## 6.1.2 Student assessment procedures

### *National assessment*

(208) The National Assessment of Basic Competencies (NABC) examines whether students are capable of applying their knowledge, using it to acquire further knowledge, that is, it assesses if students possess the inventory of applied knowledge that is indispensable for their further progress. Similarly to modern international assessments, the tests of the assessment therefore do not principally measure the fulfilment of curricular requirements, instead, the assessment examines if by exploiting their knowledge, students are able to solve problems related to everyday situations. The assessment currently aims at the evaluation of mathematics and reading skills, but the assessment of competencies in natural sciences is one of the long-term objectives.

(209) The objective of the NABC is to ensure that the assessment

- facilitates the further development of the assessment and evaluation culture of schools;
- familiarises teachers with the competency-based tools of assessment;
- provides schools with data and procedures with which they can perform the local and objective evaluation of their institution;
- provides school maintainers with data with the help of which they can compare the achievements of their institution with the national data in a reliable way.

(210) The assessment covers all schools in the country; every student included in the target population participates in the assessment. The assessment takes place simultaneously in every school, and is conducted under uniformly regulated circumstances to the greatest possible extent. The tests of the assessment consist of four parts with a working time of forty-five minutes each, two parts test reading skills, and the other two contain questions testing applied knowledge in mathematics.

(211) The framework of the content of the NABC (see Section 3.1.2) was published as an annex to a ministerial decree. The exercises and the keys of the previous years are public and can be downloaded from the homepage of the centre that is in charge of coordinating the assessment. This is to encourage teachers to get acquainted with the assessment and be aware of the requirements so that the assessment can make a real impact on the development of the assessment culture, and further so that changes in the schools in terms of content and methodology can be induced.

(212) The mathematics test of the competency assessment primarily comprises exercises that originate in mathematical problems of our everyday life. Although the assessment takes the curricula into account, it does not test the fulfilment of the formal curricular requirements of the individual grades. The tests contain exercises that are more or less embedded in realistic situations where students are expected to possess the knowledge required for finding the correct solution. The mathematics test of the competency assessment examines students' applied knowledge in mathematics.

(213) Reading exercises consider reading to be a cross-curricular cultural competency and accordingly, expect students to explore facts and their correlation and to solve the problems and situations in the texts that represent everyday life scenarios. The tests present short stories, excerpts from novels, non-fiction narratives, newspaper articles, advertisements and ordinary tables. When answering the questions related to the various sources of information,

in addition to the comprehensive interpretation of the texts, students must carry out different operations. These include both simple and complex operations: ranging from finding some specific information in the text, through defining the function of certain elements in the text to producing reflections on the way the text is constructed.

(214) Apart from the tests in the above two domains of education, students also receive a background questionnaire to map their socio-cultural environment. Since besides the students the school headmasters also fill out a questionnaire when the assessment is carried out, these two types of questionnaires supply many pieces of information to help analyse the results.

(215) Among others, the information gathered from the student questionnaires makes it possible not only to describe schools' performance in the individual school reports in terms of the blunt average of student achievements, but also to present added value. This in fact is realised by first estimating the performance a given school is expected to achieve based on the socio-cultural background of the students enrolled, and then comparing this estimate with the actual results.

(216) As mentioned earlier, assessments have taken place on eight occasions so far; on the one hand, the scope of the assessment in the meantime expanded to cover 3 grades instead of the initial 2 grades, and, on the other hand, the assessment continuously changed and developed in line with the experience gained. One significant change was the personal assessment identifier introduced in 2008. The introduction of the personal assessment identifier was motivated by the need to monitor the results and to attain a more reliable indicator of schools' work, in particular with regard to secondary schools, so that it is not only in relation to performance predicted on the basis of social background that actual performance can be judged but also in terms of real added value, comparing performances of two different dates. An incidental benefit of the introduction of the personal assessment identifier is that it is not only teachers who can follow up the achievement of a given student based on test results, but in fact – similarly to school reports – children's personal reports are uploaded on the Internet, which can be accessed by the parents in possession of the assessment identifier. Also, students transferring to another school take their assessment identifiers with them together with their former results, which can be useful to the new teachers of such pupils.

### *Examination*

(217) At the end of the 80's and the beginning of the 90's, severe criticism was levelled at the Hungarian secondary school leaving examination. As a result, upon the request of the Ministry of Education the concept of the two-tier standardised secondary school leaving examination was created, which was published in 1995. In the professional and social debate that ensued at the time the public was principally concerned with the possibility of changes in the exam subject system and the different functions of the two tiers of the examination – the ordinary level as a final examination and the advanced level as a competitive examination. The amendment of the Act on Public Education in 1996 was passed in an environment of vigorous professional debates; the amendment stipulated that there would be more tiers of the examination, defined the number of examination subjects and the range of mandatory subjects. The objections raised against the concept partly stressed that secondary education would be split into two plus two grades, and partly emphasised that the two tiers could lead to imbalance in equal opportunity. The role of the secondary school leaving examination remained unchanged: on the one hand, it serves as a pass to higher education and, on the other

hand, it entitles to employment. The new examination was regulated in 1997 in a government decree,<sup>36</sup> the introduction of which at the time was planned for 2004.

(218) The ordinary level secondary school leaving examination differs from the examination before 2005 in terms of both content requirements and nature, but it is basically organised and administered in the same way. Examinees complete written assignments in their own schools in all subjects on the dates specified in advance, and subsequently they take an oral examination in their school in front of a secondary school leaving examination committee, which is composed of teachers of the given school and a chair who does not teach in the school. Contrary to previous practice, students must take both a written and an oral examination in nearly all subjects. The written test and the evaluation guide are prepared centrally for all subjects; however, their correction and assessment are entrusted with the schools. The advanced level examination is administered by state examination committees, which are independent of the schools. The advanced level examination is an external examination, and thus it also functions as the entrance examination for admission to institutions of higher education.

(219) The new two-tier secondary school leaving examination was eventually introduced in 2005. This was preceded by trial examinations on two occasions (in 2003 with a smaller set of candidates, and in 2004 with a broader circle of candidates), with the primary aim of testing the set of assignments, construing the results and providing feedback (to teachers, examinees, examination developers and in-service teacher training), as well as supplying teachers and students with a wide range of information. Another goal was to model the organisation and the related assessment procedures (in the case of the advanced level, the external evaluation) of the written examination, and to report back the experience gained to legislature, examination developers and educational administration. In 2004, the students in grade 11 of all – including adult education – schools entitled to administer secondary school leaving examinations sat for a written test in one of the five compulsory examination subjects: Hungarian language and literature, mathematics, history, and English or German as a foreign language. The ordinary level papers in the compulsory subjects were corrected in the schools and their national assessment was carried out on a representative sample only. One of the important lessons of the trial examinations was that a shift in attitude was needed in the examination assessment system too: the teachers evaluating the papers can only assess them properly in accordance with the regulations if they are conversant with and understand the principles of assessment and are also willing to accept these (*Horváth–Lukács, 2006*).

(220) The detailed examination requirements are set out in a ministerial decree. The system of secondary school leaving examinations is built on uniform and public requirements and is operated in every type of school that concludes with a secondary school leaving examination.

(221) The new secondary school leaving examination is a standardised examination in the sense that it rests on standard requirements and is administered pursuant to a standard description of the examination. At the same time, this exam fails to meet one condition of standardisation, namely, that it should be based on a piloted and assessed set of exercises. Yet, it is more suitable for establishing the efficiency of schools and the public education system than the ones used before. Standardised quality criteria of the examination are naturally easier to attain through the central written examination – which is built on identical requirements and contains identical assignments – and the accompanying central correction and evaluation guides. The ratio of the written and the oral part has shifted completely for the

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<sup>36</sup> Government Decree No 100/1997 (VI. 13.) on issuing the examination regulations of the secondary school leaving examination.

entire secondary school leaving examination: for example, in the case of Hungarian language and literature, the former 50 to 50 percent shifted to 2/3 to 1/3, and as regards history, 90 points out of the total score of 150 can now be earned for the written test, which is completely new in the case of this subject.

(222) Five subjects are a compulsory minimum for obtaining a school leaving certificate. Of these Hungarian language and literature, Mathematics and History and one foreign language according to the students' choice are common compulsory subjects. A fifth subject is elective.

(223) In all subjects, students can choose to sit for an ordinary level or an advanced level examination. Normally, students sit for the examination in the spring term (May-June), but there is another autumn examination period as well. Students pass the examination by subject. They may choose to sit for the examination in some subjects earlier (e.g. in foreign languages) than at the end of Grade 12, if they are prepared or later, if they failed to pass one or two of the subject examinations in the normal examination period. They may also repeat the examination, for example, if they want to take an advanced level examination in a subject, in which they have an ordinary level examination already.

(224) Examinations are offered in 26 general subjects, 21 pre-vocational subjects, and 6 art subjects. In most subjects there is a written and an oral part at both levels, in some general and most pre-vocational subjects there is a practical examination as well. In some subjects, examination parts depend on the level of the examination: in mathematics, for example, there is only written examination at the ordinary level, but there is a written and an oral examination at the advanced level. The written part of all examinations is a central national examination written on the same examination day by all students and with a central scoring scheme and scoring guide. All ordinary level oral and practical examinations, however, are school based examinations with one external examiner (appointed by the Office of Education), who is the chair of the school examination board. Advanced level examinations are passed before external examination boards appointed by the Office of Education.

(225) The written and the oral parts of the examination are scored separately, the written part on a 100-point scale, and the oral part on a 50 point scale. To translate into marks, the scores are added and turned into a percent score.

The percent scores are converted into marks on a 5 point scale according to the Table 8.

Table 8. Marks of secondary school leaving examination, at ordinary and advanced level

Mark	Score point	
	Ordinary	Advanced
(5 jeles) very good	80-100	60-100
(4 jó) good	60-79	47-59
(3 közepes) moderate	40-59	33-46
(2 elégséges) satisfactory	20-39	20-32
(1) fail	0-19	0-19

(226) The condition of obtaining the Érettségi bizonyítvány (school leaving certificate or high school diploma) is a minimum of "satisfactory" mark in all of the examination subjects. Furthermore, a successful completion of the four-year (in some cases five-year) secondary programme is a pre-requisite to admission to the Matura examination (with exceptions of pre-exams in certain subjects).

(227) One of the important goals of the reform of the secondary school leaving examination was to examine the existence of complex skills. Hence, for example, in the subject of history such assignments are used to enable the assessment of to what extent the students are able to consider and use various sources, use terminology, orientate themselves in space and time, explore the factors that shaped historic events and phenomena in a problem-centred approach.

(228) Besides informing and preparing the schools and teachers over a number of years, the transformation of the secondary school leaving examination as an education policy priority was constantly on the agenda in the press and the electronic media between 1995 and 2005. This is one reason why at the end of 2005 nearly two thirds of the Hungarian adult population were informed of the fact that the secondary school leaving examination had been considerably refashioned (*Public opinion poll in education, 2005*). However, the familiarity of the public with the specific elements of the reform varies: there are many who are aware of the fact that the secondary school leaving examination has become two-tiered, but significantly fewer recognise that the nature of knowledge assessed at the examination has also changed. Opinions of the specific elements were rather positive, that is, most respondents agreed with the changes, and the option of the state examination in a foreign language was the most approved of item.

(229) Figures show that the examination results – aggregated at school level and expressed in percentage – are reliable indicators of the efficiency of a given institution. Thus, for example, there is a strong correlation between the results of the ordinary level secondary school leaving examination and the results of the competency assessment in the same school. This allows for the results of the standardised secondary school leaving examination to be used for the purpose of school assessment.

#### *Classroom assessment*

(230) The Public Education Act states that students' achievement must be regularly assessed in the form of marks, and declares the right of parents to regularly receive detailed information on the development, conduct and progress of their children. In view of this, and in order to motivate students, the majority of teachers use the means of formative assessment on a daily basis. The selection of assessment tools is the right of teachers within the limits set by the local curriculum of the school. There is no central requirement in this respect. The most popular means of formative evaluation is oral assessment, administration of short written tests (5 to 20 minutes), and checking homework assignments. The tools of summative assessment are as follows: the so-called comprehensive tests, which are administered when a larger amount of material in a subject has been covered; oral tests on the subjects of several lessons; papers or presentations based on individual observations, experiments and collection of materials; less frequently, primarily in alternative schools, annual or more frequent internal examinations; and an internal final examination at the end of grade 10 ("mock secondary school leaving examination"), which is prevalent in some of the comprehensive secondary schools.

(231) The majority of teachers use the same five-grade scale for both formative and the summative assessment, consequently, the two types of assessments are confused and at times are puzzling for the parents and children alike. The marks and grades used to assess knowledge are as follows: very good (5), good (4), moderate (3), satisfactory (2), and fail (1). To rate conduct and effort, a four-grade scale is used: exemplary (5), good (4), average (3)

and poor/negligent (2). The marks are recorded in the mark book, which contains the basic personal data of children.

### **6.1.3 Competencies to assess students and to use assessment results**

(232) The capacity of the Educational Authority in terms of the professional staff who can carry out the statutory assessment tasks is barely sufficient, which does not permit a full analysis of the data, although the database has many untapped potentials. It would therefore be important to transfer capacities from other external areas for the purpose of analysis, but either there is no such external expertise available or if there is, it has no capacity for and/or interest in the data of the National Assessment of Basic Competencies, thus the secondary analysis of the databases is still at a rudimentary stage.

(233) Since the most important goal of the assessment is to make schools use them, the Educational Authority strives to do its best to make this happen. In 2009, for example, awareness raising campaigns were held in every region, with thorough professional content. These occasions can also serve to strengthen the reputation and acceptance of the assessment, and to give professional impetus in order to make the use of the results as diverse as possible. It was mainly the representatives of schools that attended these regional events. Maintainers' representatives were also invited, and some of them did in fact attend. Nevertheless, the professionals at the Authority claim that maintainers are very difficult to reach, even with the prospect of free-of-charge programmes. Yet, this would be important because some are eager to be provided with these data and use them with false concepts and great interest. That is one of the reasons why the Educational Authority and the Ministry (based on the accounts of their officials) regard these trainings and the dissemination of information to be their mission.

(234) Besides these events, the website dedicated to the assessment<sup>37</sup>, where all additional information is available, wishes to facilitate competent data usage. Assessment specialists often publish in educational journals, too.

### **6.1.4 Using student assessment results**

(235) Schools are required to use the results of the National Assessment of Basic Competencies and the manner of use must be laid down in the institution's QMP.

(236) The conditions of promotion to a higher grade, the requirements and forms of student assessment – to test their knowledge –, and the requirements pertaining to the evaluation and rating of students' conduct and efforts are set out in the local curriculum of schools. There are no mandatory examinations in primary schools. The national assessment has no effect on students' progress and is not even suitable for such purpose. It is only the secondary school leaving examination that has real consequences, but due to its nature, it is associated with an exit point. One of the characteristics of the reform of the secondary school leaving examination was exactly that it abolished the entrance examination for admission to higher education.

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<sup>37</sup> [www.kompetenciameres.hu](http://www.kompetenciameres.hu)



## ***6.2 Implementation of student assessment***

(237) During the school survey in 2009, which was referred to earlier, the answer to the question of ‘What is the general school achievement of 15 year-old Hungarian students like in a European comparison?’, by nearly half of the school headmasters interviewed was that their achievement was similar to the European average. Every fourth headmaster thinks that it is worse, and one fifth of them believe that Hungarian students do better than their European peers. The rest (somewhat more than 5 percent) could not give an opinion.

(238) School headmasters were asked what they thought the reason was for the fact that Hungarian students lagged behind the international average according to the PISA surveys. The headmasters tended to be very much unified in citing the most important reasons but they were less unanimous about the explanations they believed to be less relevant. Half of the headmasters identified the following to be the 3 most important reasons: the PISA surveys assess something different than what children are taught in school, and out of five headmasters two also agreed that Hungarian education focused too much on theory. Another possible explanation which ranked relatively high was that the state spends a low sum on education, and that the parents fail to place sufficient emphasis on their children’s education. Relatively many indicated the lack of professional control in schools as the least important reason, i.e. according to the headmasters this is not the reason behind poor performance. On the whole, it seems that headmasters identified the reasons to be external circumstances, which are beyond their control, and they do not think that a more rigorous supervision of schools’ work could improve the results.

## ***6.3 Policy initiatives***

(239) Currently, no major changes are planned in the system of competency assessment; the existing system is being refined in terms of professional aspects and technology. There are statistical audits foreseen under the EU development project mentioned earlier, which could attest that these methods are scientifically grounded.

(240) There are short-term development objectives, the vast majority of which aims at the exploitation of the new opportunities offered by the introduction of the personal assessment identifier, such as the expansion of the themes in school reports, and better utilisation of the data system. A long-term objective is to examine the possibility of assessment in natural sciences, to identify the related conditions, and to explore the option of electronic assessment, as this would perhaps be less cost-intensive and would definitely make data processing quicker.

## Chapter 7: Other types of evaluation and assessment

(241) Hungary has a rich diversity of accreditation mechanisms. The accreditation procedure is a kind of evaluation which serves to guarantee quality. Framework curricula<sup>38</sup>, textbooks, programme packages, digital teaching materials and even initial and continuous teacher training are subjected to this type of approval. These procedures can all contribute to the increase of the efficiency of public education.

(242) The accreditation of framework curricula aims at establishing whether the given framework curriculum is in compliance with the relevant pieces of legislation and the National Core Curriculum. The developer of the framework curriculum or the maintainer of the applying school can submit the curriculum to the Educational Authority for accreditation. The accreditation is prepared in cooperation with the Framework Curriculum Committee of the National Council for Public Education (OKNT)<sup>39</sup>. This Committee has seven members, out of which three are delegated by the OKNT, with the minister responsible for education, the minister responsible for labour, the Hungarian Academy of Sciences and the Council of Public Education Policy delegating one member each. The members are mandated for 3 years. The criteria of accreditation are developed by the OKNT, and the Committee decides on accreditation after consulting three different expert opinions. The applicant also receives the opinions, and if the Committee proposes that the framework curriculum should be accepted, the OKNT decides on its approval. Where an affirmative decision is made, the minister promulgates the accredited framework curriculum. Applicants must pay a procedural fee, which is reimbursed if the accreditation is successful.

(243) The quality control of textbooks is also realised by way of accreditation. Only those textbooks can be listed in the textbook register, which prove to be compliant with the judgment criteria of accreditation. The criteria applied to the approval of textbooks are set out in the annex to a ministerial decree. Among others, during the procedure it must be examined if the language of the textbook is appropriate, how often on average it uses technical terminology, if the illustrations are appropriate and whether the questions and the exercises advance problem-solving thinking.

(244) In Hungary, a new system of in-service teacher training was developed, over a relatively short period of time, during the 90's. Apart from the creation of its legislative and financial background, the system extended to the establishment of an institution capable of providing professional support and the setting up of a (accreditation) body entrusted with quality assurance. The Act on Public Education stipulates<sup>40</sup> that teachers shall at least on one occasion undergo in-service training every seven years. A novelty of the system is that instead of the training providers, the recipients of state support earmarked for in-service training are now the users. Institutions prepare a five-year in-service training plan, which is beneficial as far as the institutional development processes are concerned, but the fact that the actual amount of state support is determined every year through budgetary negotiations poses some difficulties.

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<sup>38</sup> Framework curricula are regulatory tools that have been in existence since 1999 (in fact, these represent an intermediate curricular level between the central core curriculum and the local curricula of institutions), and are built on the National Core Curriculum to ensure the unity of the content of school education and instruction and mobility across schools.

<sup>39</sup> The National Council for Public Education is a national body entrusted with the task of preparing decisions, giving opinions and presenting proposals. This body participates in the professional preparation of decisions in the field of public education.

<sup>40</sup> Article 19 (8) of Act LXXIX of 1993

(245) With the introduction of the new in-service training system, a supply market emerged where the different service providers strove to get their programmes accredited. The register of the accredited in-service teacher training programmes is managed by the Educational Authority in an online system. When the present study was conducted (April 2010), this system stored the data of 1924 in-service teacher training programmes. It is the minister responsible for education who decides on the approval of in-service training programmes and the issuance of the foundation permit on the basis of the opinion of the Accreditation Board for In-service Teacher Training. Before formulating its opinion, the Accreditation Board for In-service Teacher Training requests an expert opinion.

#### **Judgment criteria for the evaluation of in-service teacher training programmes**

1. The degree to which the content of the programme is elaborated
2. Programme assessment to determine if the programme in question serves its purpose
3. Programme assessment to determine compliance with requirements
4. Internal and external coherence of the detailed syllabus of the programme
5. Compliance between quality assurance obligations and activities

*Government Decree No 277/1999 on in-service teacher training, specialist teacher examination, and the benefits and allowances of attendees*

(246) While Hungary has made good progress in the operation of accreditation mechanisms, there is a field that is very underdeveloped: the evaluation of development interventions. The country, in turn, spends enormous amounts on development programmes. Usually, the effects of policy interventions and development efforts are expected to be assessed. The Innovation Act<sup>41</sup> in Hungary provides that research and development programmes must be regularly evaluated, that for this purpose funds must be allocated, and that the results should be disclosed to the public<sup>42</sup>. A separate decree<sup>43</sup> is dedicated to the content requirements of evaluation. Based on this, evaluation plans must be prepared already during the development of the programme, the targets to be evaluated must be defined, relevant indicators should be rendered thereto, and the schedule of evaluation ought to be provided for. Although the regulation is circumspect, it only defines the necessary framework. As regards the funds available for evaluation, it only specifies the maximum limit (1.5 percent), but in the absence of a threshold, those commissioning the evaluation define a very meagre budget and close associated deadlines (Lannert 2009).

(247) Evaluation is mandatory for programmes that are financed via EU funds. There are EU recommendations in place that are not very specific and contain no methodological descriptions or do not define amount limits. It is a welcome fact that the – small number of – evaluations carried out so far are available on the homepage of the National Development Agency (the agency managing EU development programmes). Unfortunately, the modest budget does not allow for any earnest, methodologically well-founded evaluations to take place. Another restraining factor is that these programmes reveal their effects only after a longer period of operation. Currently, the fact that the working time allotted to evaluation is

<sup>41</sup> Act CXXXIV of 2004 on Research and Development and Technological Innovation

<sup>42</sup> Article 13 (4) of Act CXXXIV of 2004 on Research and Development and Technological Innovation

<sup>43</sup> Government Decree No 198/2005 (IX. 22.) on the evaluation system and the content requirements of programmes in research and development and technological innovation financed from public funds

rather short is not the only problem; another concern is that the programmes are subject to evaluation before they come to an end.

(248) Most of the time, it is cross-section data that are examined, which is usually due to technical conditions. This is mostly due to the fact that in the case of the majority of the programmes, upon their launch, the need for entering programme evaluation input data was completely ignored. Even if the programme developers were aware of this, in many cases they were not able to formulate the objectives, the achievement of which should have been measured and evaluated. There are hardly any programme evaluations that would also compare the costs of the programme with its social gains. A further problem is that there are no well-developed indicator systems. Indicators are indeed often selected on an ad hoc basis, and these are not always adapted to the final goal of the programme, or fail to distinguish according to the different options available for programme implementers.

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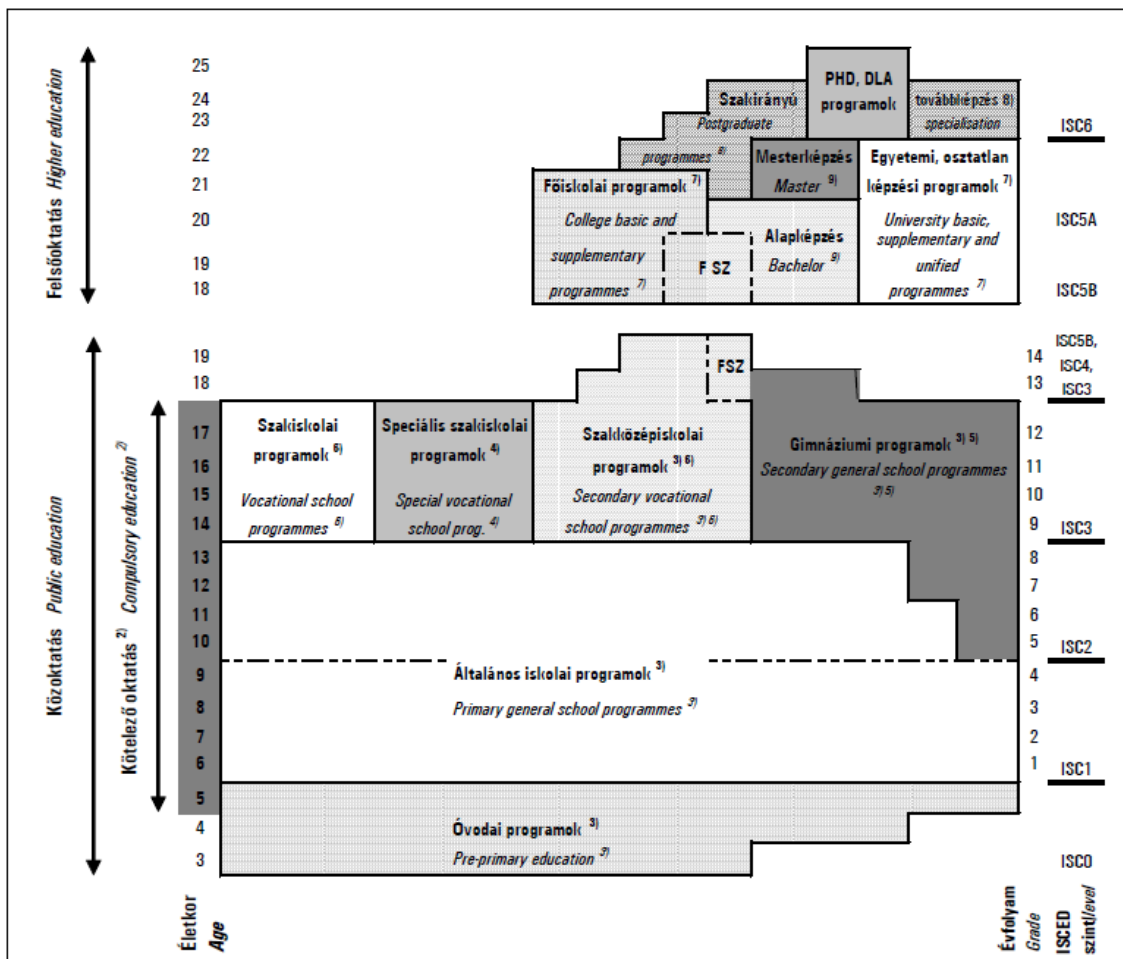
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SZÁRNY ÉS TEHER - Ajánlás a nevelés-oktatás rendszerének újjáépítésére és a korrupció megfékezésére [WINGS AND BURDENS – Recommendation for the Renewal of the Education and Teaching System and the Curbing of Corruption]

[http://bolcsektanacs.solyomlaszlo.hu/Szarny%20es%20teher%201\\_224.pdf](http://bolcsektanacs.solyomlaszlo.hu/Szarny%20es%20teher%201_224.pdf)

## Annex

**Az iskolarendszerű köz- és felsőoktatás szerkezete életkor, évfolyam és ISCED szint szerint <sup>1)</sup>**  
*The Structure of the Hungarian Public Education and Higher Education System by age, grade and by ISCED level <sup>1)</sup>*



- 1) Az egyes programoknál az életkort és a tipikus képzési időt a nappali képzésre vonatkozóan jelöltük – *The figure shows the typical age and typical length of programmes in full-time education.*
- 2) Kötelező oktatás időszaka: 1998/99-es tanévtől tanulmányaikat kezdők esetén 18 éves korig tart – *From 1998/99 academic year the compulsory education lasts until age of 18 years.*
- 3) Óvodai, általános iskola, gimnáziumi és szakközépiskolai programok magukban foglalják a gyógypedagógiai tanterv szerinti nevelést oktatást is. – *Pre-primary, primary general, secondary general and secondary vocational school programmes include also the programmes for pupils with special educational needs.*
- 4) Speciális szakiskolai programok: gyógypedagógiai tanterv szerinti szakiskolai oktatást jelent, ISCED 2, ISCED 3 szinten, érettségihez nem kötött szakképzési programokat tartalmaz. – *Special vocational programmes mean vocational school programmes delivered to students with special educational needs at ISCED 2, ISCED 3 levels, vocational programmes contain programmes without requirement of maturity examinations.*
- 5) Gimnáziumi programok: 4(5), 6, illetve 8 évfolyamos programokat foglalja magában. – *Secondary general school programmes include the programmes with 4 (5), 6 and 8 grades.*
- 6) Szakiskolai, szakközépiskolai programok: érettségihez nem kötött, érettségihez kötött, illetve a felsőfokú szakképzési (FSZ) programokat foglalják magukban – *Vocational and secondary vocational school programmes contain programmes with requirement and without requirement of maturity examination and accredited post-secondary vocational programmes.*
- 7) Főiskolai, egyetemi és osztatlan képzési programok – *College, university and unified programmes.*
- 8) Szakirányú továbbképzés: főiskolai vagy egyetemi alapképzésben megszerzett végzettségre és meghatározott szakképzettségre épülő képzés ISCED 5A szinten, amely újabb végzettséget nem, de speciális szakirányú szakképzettséget ad. – *Postgraduate specialisation programmes: programmes in ISCED 5A level with requirement of graduation in college or university and with requirement of special attainments. These programmes do not give a higher attainment level, but give a special qualification.*
- 9) Bolognai folyamat szerinti alap- és mesterképzés. – *Bachelor and master programmes according to Bologna-process.*

Source: Statistical Yearbook of Education, 2009/2010.