

3 June 2014

IM60/104/52/3

Education Report: Advice on Preferred Partnership Schools | Kura Hourua 2014 Applications


Recommendations

We recommend that you:

- a. **note** that the Partnership Schools | Kura Hourua Authorisation Board (Board), supported by the Ministry, has completed the round two application assessment process.
- b. **note** that the report from the Board providing you with a list of its ranked recommendations of preferred applicants and rationale is attached.
- c. **note** that the Board's recommendations, in ranked order, are:
 - 1 Manukau Urban Māori Authority
 - 2 The Pacific Peoples Advancement Trust
 - 3= Ngā Kākano o te Kaihanga Trust (in alphabetical order)
 - 3= Villa Education Trust
 - 5 He Puna Marama Charitable Trust.
- d. **note** that you will receive from the Ministry, further analysis of the financial and network implications related to the Board's recommendations to support your decision making in early June.


Rowena Phair
Deputy Secretary
Student Achievement

s 9(2)(a) OIA


Hon Hekia Parata
Minister of Education

11/6/14

Education Report: Advice on Preferred Partnership Schools | Kura Hourua 2014 Applications

Purpose of Report

1. This report attaches a paper from the Partnership Schools | Kura Hourua Authorisation Board (Board) that informs you about the Board's ranked list of those applicants it recommends proceed into contract negotiations to establish a Partnership School in 2015.

Background

2. This follows advice provided to you on 12 May 2014 (METIS 860411 refers) updating you on the progress made in assessing the 19 applications and sought your approval to decline 11 of the applications.
3. The Board indicated that it had selected seven applicants to interview and were seeking further information from one applicant before deciding to progress that applicant to the interview stage.
4. The Board interviewed eight applicants over two days (14-15 May 2014) in Auckland.
5. The Ministry notified, in writing, the 11 unsuccessful applicants of this decision on 19 May 2014.
6. The Board, with the support of the Ministry, has now completed the applicant evaluation process.
7. The Board's role in the application process is to recommend those applications you should consider for contracting to operate a Partnership School in 2015.

The Board's recommendations

8. A paper from the Board providing you with its ranked list of five recommended applicants and its rationale for recommending each of these applicants is attached to this report as Appendix 1.
9. The Board recommends that you consider the five applicants listed below, in ranked order, to proceed to the contract negotiation stage with a view to some or all of them establishing a Partnership School opening in 2015:

1 Manukau Urban Māori Authority

Applicant	Manukau Urban Maori Authority
School Name	Te Poutoko Manawa
Vision/Mission	Through the provision of a culturally enriched, safe and whānau-centric learning environment, we will assist our learners and their whānau to develop a love of learning together. They will be eager and deeply engaged in their unique journeys of exploration and self discovery
Target Students	Students from low socio-economic backgrounds Māori students
Location	Nga Whare Waatea Marae, 31 Calthorpe Close, Mangere
Type	Composite primary school (Years 1-8)
Opening Roll	60
Maximum Roll	155
Special Character	Kaupapa Māori
Curriculum	Curriculum based on Kaupapa Māori and Steiner principals and aligned to the New Zealand Curriculum

2 The Pacific Peoples Advancement Trust

Applicant	The Pacific Peoples Advancement Trust
School Name	Pasifika Community School
Vision/Mission	Enriched, vibrant, dynamic and successful Pasifika youth Secure and confident in their educational pathway, identities, languages and cultures
Target Students	Students from low socio-economic backgrounds Pasifika students
Location	Atkinson and Princess Street, Otahuhu South Auckland
Type	Senior secondary school (Years 11-13)
Opening Roll	100
Maximum Roll	250
Special Character	Pasifika cultural context and approaches
Curriculum	Pasifika Community School curriculum aligned to the New Zealand Curriculum

3= Ngā Kākano o te Kaihanga Trust

Applicant	Ngā Kākano o te Kaihanga Trust
School Name	Ngā Kākano o te Kaihanga Kura Hourua
Vision/Mission	Māori Excelling as Māori - For all students to reach their full God given potential, allowing them to excel and be successful as Māori; knowing who they are and where they belong.
Target Students	Māori students
Location	22-24 Waipareira Ave, Henderson
Type	Composite school (Years 1-13)
Opening Roll	120
Maximum Roll	240
Special Character	Faith Based - Christian
Curriculum	Intend to transition from Accelerated Christian Education (ACE) to the New Zealand Curriculum

3= Villa Education Trust

Applicant	Villa Education Trust
School Name	West Auckland Middle School
Vision/Mission	Through effective teaching, quality facilities, an optimal day structure, and an integrated curriculum – allowing young people to develop and learn so as to give them the base for excellence in all spheres of life.
Target Students	Students from low socio-economic backgrounds Māori students Pasifika students Students with special education needs
Location	West Auckland
Type	Middle school (Years 7-10)
Opening Roll	210
Maximum Roll	240
Special Character	Christian values
Curriculum	New Zealand Curriculum


5 He Puna Marama Trust

Applicant	He Puna Marama Trust
School Name	Te Kāpehu Whetū
Vision/Mission	Tu kit e marae....Tu kit e Ao (I can stand on the marae....I can stand in the world. Unlock the potential of our rangatahi while honouring the deeds of our tupuna
Target Students	Māori students
Location	78 Tarewa Road, Otaika, Whangerei
Type	Primary school (Years 1-6)
Opening Roll	40
Maximum Roll	100
Special Character	Bilingual Māori
Curriculum	Te Marautanga o Aotearoa

- 11 An evaluation summary, prepared by the Ministry evaluation team, for each of the eight interviewed applicants is attached to this report for your information as Appendix 2.
- 12 The evaluation summaries include due diligence relating to each application. The assessments are focussed on:
 - the quality of the proposed educational offering
 - the ability of the proposal to provide value-add to priority learners
 - governance
 - property
 - teaching and management capability
 - financial feasibility, and
 - network and risk analysis.
- 13 This evaluation summary is additional information to support the advice provided by the Board.

Next steps

- 14 The Ministry is undertaking further analysis of the financial and network implications related to the Board's recommendations to support your decision making. We will provide this information to you in early June.

 s 9(2)(a) OIA

30 May 2014

Hon Hekia Parata
Minister of Education

Tēnā koe Minister

This report provides you with the Partnership Schools | Kura Hourua Authorisation Board's recommendations about the applications we believe you should consider approving to open a Partnership School in 2015. This year the Board has brought forward its review process in order to provide the opportunity for successful applicants to have the maximum time possible to prepare for opening in Term 1 2015.

The Board's recommendations in ranked order are:

- 1 **Manukau Urban Māori Authority** which proposes setting up a year 1 to 8 bilingual marae-based school in their Mangere community, using Steiner principles.
- 2 **The Pacific Peoples Advancement Trust** which proposes to set up a year 11 to 13+ school in Otahuhu offering trade-based vocational training set in a Pasifika cultural context and using the Pasifika Vaka of learning.
- 3= **Ngā Kākano o te Kaihanga Trust** which proposes to set up a year 1 to 13 school in West Auckland offering a needs-based, responsive education set in Te Ao Māori and based on Christian values, for high-need priority learners.
- 3= **Villa Education Trust** which proposes to establish a year 7 to 10 school in West Auckland based on Christian philosophy and values similar to the Partnership Kura, South Auckland Middle School, it established in 2014.
- 5 **He Puna Marama Charitable Trust** which proposes to establish a year 1 to 6 school in Whangarei to complement its ECE centres and its year 9 to 13 Partnership Kura (which has approval to extend to years 7 and 8). We are recommending the proposal be viewed as a variation of its existing PSKH contract.

I can confirm that the Board, with support from the Ministry of Education, carried out detailed evaluations and deliberations on all applications received before reaching the recommendations set out in the report. The Board's process has included:

- evaluation of written applications against the agreed criteria and the Government's preferences
- consideration of written clarifications provided by applicants, and
- moderation with the Ministry evaluation team based on their independent evaluations of the applications.

For the eight shortlisted applicants, the Board carried out:

- interviews with each of the applicants
- referee checks for the five preferred applicants
- further clarification with applicants following the interviews
- collaborative, detailed discussions among Board members on each shortlisted application, drawing together all the information available including how each met the Government's preference factors, to come to decisions on the relative quality and capability of each application.

The Board is satisfied that any remaining issues in relation to each of the five recommended applicants which are detailed in the report can be addressed in the negotiation process.

I confirm that the Board has confidence that it has identified and recommended sponsors who are capable of meeting the Government's objectives for improving outcomes for priority learners by establishing and successfully operating a Partnership School.

Please let me know if there is anything further we can provide to support you in making these decisions or to assist in expediting the process.

Ngā mihi



s 9(2)(a) OIA

Catherine Isaac
Chairperson
Partnership Schools | Kura Hourua Authorisation Board

Authorisation Board Advice on Preferred Partnership Schools | Kura Hourua 2014 Applications

Purpose of Report

10. This report provides you with:
 - information about the Partnership Schools | Kura Hourua (Partnership School) Round Two application process
 - information about the eight shortlisted applicants interviewed by the Authorisation Board (the Board)
 - the Board's ranking of applicants, including the five recommended as suitable applicants.

Background

11. You appointed the Board under Section 158C of the Education Act 1989 (the Act) to provide advice in relation to the approval of sponsors.
12. Applications to establish Partnership Schools in 2015 closed on 11 March 2014. 19 applications were received.
13. On 13 May 2014 you agreed to decline 11 applicants based on the results of the initial evaluation [METIS 860411 refers]. The Ministry of Education (the Ministry) notified unsuccessful applicants of this decision on 19 May 2014.
14. The Board, supported by Ministry staff, conducted interviews of the remaining eight applicants between 14 and 15 May 2014 in Auckland.
15. The Board has now completed the application evaluation process.

Evaluation of Applications

16. The Board undertook a thorough analysis of the applications based on agreed criteria. The Ministry provided the Board with additional information and analysis about the relative strengths and weaknesses of each application.
17. Applicant interviews were used to further interrogate the applications and clarify aspects of the proposal that were unclear. Following the interviews, the Board agreed that five applicants were of sufficient quality to be considered to open in 2015, and, after further evaluation, provisionally ranked them as follows. They are:

Ranking	Applicant
1	Manukau Urban Māori Authority
2	The Pacific Peoples Advancement Trust
3=	Ngā Kākano o te Kaihanga Trust
3=	Villa Education Trust
5	He Puna Marama

18. The Board agreed that three applications were not strong enough to be considered to open in 2015. They are:
- Auckland City Training School
 - Creators Collaborative Trust
 - Te Kōhao Health Limited
19. The Board's provisional ranking of the five applicants we believe followed a further evaluation against the key selection criteria and against the Government's preference factors. The tables below summarise the results of this evaluation:

Table 1: Selection Criteria for Partnership Schools

Selection criteria	He Puna Marama	MUMA	Ngā Kākano	PPAT	Villa
Targeting priority learners	√	√	√	√	√
*Quality of the educational offering	√	√	√	√ vocational	√
Organisational capability	√	√	√	√	√
Financial	√	√	√	√	√
Risk	low	low	low	low	low
Community support	yes	strong	strong	strong	?

**refer to paragraph 73 for key points for further discussion re specific applicants*

Table 2: Application of the Government's preferences

Government's preference factors	He Puna Marama	MUMA	Ngā Kākano	PPAT	Villa
Cater for primary age students	√	√	√	no	√
Make effective use of the flexibilities provided by the model	√	√	√	√	√
Are based in areas of roll growth	minimal	√	√	√	√
Are large enough to be comfortably viable	?	√	√	√	√
Demonstrate a strong case for the location in relation to areas where students are not being well served by the education system	√	√	√	√	?
Offer innovative options for 0-8 year olds	potentially	no	no	no	no

20. Referee checks on the five recommended applicants have been undertaken by the Board. No information was discovered that changed the applicants' ranking.

Results of the procurement process

21. The Board recommends that you consider the five applicants listed above to proceed to the contract negotiation stage with a view to some or all of them establishing a Partnership School in 2015.
22. Issues in relation to each of the five recommended applications that the Board considers would need to be addressed in the contract negotiation process are listed in paragraph 73 below.
23. A brief summary of each of the preferred proposals following the evaluation process is provided in the paragraphs below.

Manukau Urban Māori Authority (MUMA)

Applicant	Manukau Urban Māori Authority				
School Name	Te Poutoko Manawa				
Target Students	Students from low socio-economic backgrounds Māori students				
Location	Nga Whare Waatea Marae, 31 Calthorpe Close, Mangere				
Maximum Roll	155				
Year Level	2015	2016	2017	2018	2019
1	15	20	20	20	20
2	15	20	20	20	20
3	15	20	20	20	20
4	15	20	20	20	20
5		15	20	20	20
6			15	20	20
7				15	20
8					15
Total	60	95	115	135	155
% Roll Growth (YoY)		58%	21%	17%	15%

24. MUMA was established in 1985 to represent the interests of urban Māori in South Auckland. It is a substantial organisation with significant existing infrastructure and organisational capability, and close relationships with government education, social and justice agencies. It is an accredited Whānau Ora provider with a strong track record in a range of fields, including early childhood education, youth social work, justice, and mentoring in secondary schools.
25. MUMA's proposal is to set up a bilingual year 1 to 8 school based in Mangere, opening with 60 students in 2015 and growing to a maximum roll of 155 in 2019. The school will be based at existing property (Nga Whare Waatea Marae) using existing facilities for the first two classrooms, eventually developing a high quality, purpose-built facility.
26. The Applicant makes a strong case for establishing this school in their high need community, and they see it as an opportunity for them, as Māori community leaders, to play an active role in enabling Māori and Pasifika students to achieve their full educational potential.
27. As part of their focus on lifting academic performance among priority learners, MUMA propose to adopt a Steiner approach. They will do this by weaving

together the complementary strengths of Kaupapa Māori and Steiner school philosophies.

28. In response to questions about the formal relationship between the sponsor and the Steiner Federation, and related issues such as the nature of student performance assessment and potential challenges in recruiting suitable staff, the applicant explained that the school would not be a Steiner school; rather it would adopt Steiner principles as appropriate. It would use standard assessment tools, and advertise and appoint the best applicant for any position. The Board was comfortable with this approach.
29. MUMA's lack of experience in delivering primary education was raised at interview. The applicant satisfied the Board that its plans to appoint an experienced education leader together with supporting teaching staff would address this issue.
30. The Board concluded that this is a very good application overall. MUMA has strong credibility and capability. Its proposal is aspirational, innovative and highly focused on achieving positive outcomes for Māori. The education plan, including the approach to teaching and learning, is compelling. The applicant clearly understands the importance of community/whanau/kura relationships and partnerships. The commitment of MUMA's leaders to ensuring the success of the kura was very evident.
31. Referees were contacted by the Board. No issues of concern were raised.
32. The Board resolved to recommend that MUMA, subject to negotiations, be approved to open and operate a school in February 2015.

The Pacific Peoples Advancement Trust (PPAT)

Applicant	The Pacific Peoples Advancement Trust				
School Name	Pasifika Community School				
Target Students	Students from low socio-economic backgrounds Pasifika students				
Location	Otahuhu				
Maximum Roll	250				
Year Level	2015	2016	2017	2018	2019
11	100	100	105	105	105
12		75	80	80	80
13+			65	65	65
Total	100	175	250	250	250
% Roll Growth (YoY)		75%	43%	0%	0%

33. PPAT was established in 2009 by Pasifika leaders from West, Central and South Auckland to promote and provide an Auckland and Pasifika response to raising aspirations and outcomes for Polynesian youth, both Pasifika and Māori.
34. PPAT's focus has been on social and economic programmes, particularly around youth education and mentoring, centred on Pasifika cultural norms and values. It oversees a consortium of community-based organisations, including *The Village Community Services Trust* and *Affirming Works*, that deliver vocational qualifications at levels 1 to 4, primarily to at-risk Pasifika and Māori youth, with the aim of enabling them to take on work opportunities.

35. PPAT proposes to establish the Pasifika Community School (PCS), a year 11 to 13+ school with a strong emphasis on trade-based vocational training. It will be a *Pasifika mo Pasifika* school, led and developed by Pasifika for Pasifika, using the Pasifika Vaka of learning to inspire educational success in disadvantaged youth.
36. It aims to increase '*graduate Pasifika learners straddling both the Pasifika and Western worlds, successfully educated and employed, contributing to a wider society and flourishing in development expressed in the greater good of all.*'
37. PCS will start with a roll of 100 in 2015, growing to 250 students in 2017. It will have an open enrolment policy, welcoming students from other ethnicities. Services would be delivered by *The Village Community Services Trust* and *Affirming Works*. In the original proposal the school was to be based in Avondale, but the applicant is now considering a site in Otahuhu.
38. A central feature of the proposal is academic mentoring of students and personalised education plans. PCS would initially develop partnerships with tertiary organisations to assist with curriculum delivery, such as Open Polytechnic, that can support the school's programmes; but its intention is to move to self-sufficiency within its first 12 months of operation.
39. PPAT recognises that to establish the school to open and operate successfully by February 2015, they will need additional project management expertise and strong education leadership.
40. The Board was impressed with the expertise and credibility of the key people involved in the application: Hamish Crooks, Michael Jones and Emeline Afeaki.
41. The Board concluded that this is a strong, aspirational proposal aiming to fill an important, unmet need. The Board sees the sponsor's goal of developing a unique educational approach based in Pasifika cultural norms and values as highly commendable. The case they make for a senior secondary school offering trade-based vocational training specifically focused on unengaged Pasifika youth is compelling. The sponsor is a credible, capable organisation with a strong, relevant track record, led by people of high standing across Auckland's Pasifika communities.
42. Referees were contacted by the Board. No issues of concern were raised.
43. The Board resolved to recommend that PPAT, subject to negotiations, be approved to open and operate a school in February 2015.

Villa Education Trust (Villa)

Applicant	Villa Education Trust				
School Name	West Auckland Middle School				
Target Students	Students from low socio-economic backgrounds Māori students Pasifika students Students with special education needs				
Location	West Auckland				
Maximum Roll	240				
Year Level	2015	2016	2017	2018	2019
7	60	60	60	60	60
8	60	60	60	60	60
9	60	60	60	60	60
10	30	60	60	60	60
Total	210	240	240	240	240
% Roll Growth (YoY)		14%	0%	0%	0%

44. This is a strong proposal put forward by experienced operators who have demonstrated their capability through the establishment and operation of Mt Hobson Middle School and in 2014 opening one of the first Partnership Schools, South Auckland Middle School.
45. The proposal is to establish a second Partnership School catering for 210 year 7 to 10 students in 2015 and growing to 240 students in 2016, replicating the model that has been successful in the other schools the applicant operates. At this stage, the applicant is proposing for the school to be in West Auckland, but a precise location and property is yet to be identified.
46. The Board felt that the experience of the applicant meant that priority learners would be attracted to the school through the reputation the schools are developing, and students would be well served.
47. The Board is impressed with the Villa model, which offers 'a *window of opportunity, an alternative pathway to success for priority learners*', and that the proposal is very much based on the sponsor's belief, well backed by experience, that '*all learners can achieve to their potential regardless of the barriers that exist*'.
48. The Board noted that the applicants have shown they can successfully establish and have a school up and running effectively in a short time frame. The Board's concern, that by opening another school the applicants may be stretching themselves too thinly, was satisfactorily addressed at interview.
49. The Board would want to be confident that contingency planning is in place so that the schools are not totally reliant on two key people, and that this will be included in negotiation discussions if Villa is approved.
50. Referees were contacted by the Board. No issues of concern were raised.
51. The Board resolved to recommend that Villa, subject to negotiations, be approved to open and operate a school in February 2015.

Ngā Kākano o te Kaihanga Kura (Ngā Kākano)

Applicant	Ngā Kākano o te Kaihanga Trust				
School Name	Ngā Kākano o te Kaihanga Kura Hourua				
Target Students	Māori students				
Location	Waitakere				
Maximum Roll	240				
Year Level	2015	2016	2017	2018	2019
1	10	8	10	12	13
2	10	10	10	15	19
3	15	11	12	14	18
4	11	13	13	16	18
5	10	10	15	17	19
6	7	12	12	18	19
7	10	12	14	16	19
8	10	12	14	18	19
9	8	12	14	18	19
10	8	12	14	18	19
11	8	10	14	18	19
12	6	10	12	18	19
13+	7	8	12	16	20
Total	120	140	166	214	240
% Roll Growth (YoY)		17%	19%	29%	12%

52. This applicant is an existing private school, which has been operating for 17 years, specialising in delivering needs-based, responsive education based on Christian values, for high-need, at-risk and special needs Māori learners. The existing school, which does not charge fees, is well known in its community as a 'last chance' school that attracts students and whanau with multiple disadvantages, and succeeds in engaging them in learning. It has a waiting list and very high attendance rates, and anecdotal evidence indicates successful 'against the odds' outcomes for many students.
53. The applicant has submitted an aspirational proposal to establish a year 1 to 13+ school in West Auckland, catering for 120 students in 2015, and growing to 240 students by 2019. The sponsors are proposing to close the private school to open the Partnership School. They will accommodate current students and open the roll to more high priority students.
54. The applicant has traditionally used the Accelerated Christian Education Curriculum (ACE) which it believed worked well for students with multiple learning challenges, but in recent years has been providing the New Zealand Curriculum for senior students. At interview the applicant advised that they intend to phase out use of the ACE curriculum and that the new kura, if approved, will use the New Zealand Curriculum as the basis for programme planning and assessment, taught by teachers at the school and, if need be, through Te Kura.
55. The applicants state that the additional funding the Partnership Kura model provides will allow them to extend their reach and the quality of their offering, by enabling them to: appoint more, high-quality trained teachers; upgrade systems; develop enhanced programmes and practices to support student learning; and enable more students to have access to what has proven to be a very successful model.

56. The applicant was accompanied and strongly supported at interview by members of their Board and their local community. They included: Board Chair, Bernie Allen, Davenport Wests Lawyers; Board member John Tamihere, Waipareira Trust (John Tamihere advised that the Waipareira Trust intended to support the applicant and the school if approved); Board member Dr Peter Mellalieu, business studies lecturer, Unitec; and Board member Beth Coleman, IT consultant and knowledge specialist, University of Auckland.
57. In response to further clarification questions following the interview, the applicant advised that the Pastoral Care Leader of the kura will be its founder, Te Rangi Allen, with responsibility for Te Ao Māori and student welfare and guidance, and the school's Principal, responsible for delivery of the academic curriculum, will be Veronica Allen. She will be assisted in an advisory capacity by Owen Hoskin, former Massey Principal, and Geoff Matthews, Hebron College Principal.
58. The Board felt that the applicant has made a significant shift in the past year to align their education delivery more closely to that of regular schools, while retaining the essence and personal character of the offering that enables them to meet the needs of their target students.
59. The Board's overall assessment is that the applicant has developed a model of education that works for the hard core of priority students, for whom the Partnership Kura model was designed. As well as a good quality educational offering with a focus on individual learning, the proposed school will provide strong pastoral care and a high degree of whanau engagement. It is backed by very strong community support.
60. Referees were contacted by the Board. No issues of concern were raised.
61. The Board resolved to recommend that Ngā Kākano, subject to negotiations, be approved to open and operate a school in February 2015.

He Puna Marama Charitable Trust (He Puna Marama)

Applicant	He Puna Marama				
School Name	Te Kāpehu Whetū				
Target Students	Māori students				
Location	78 Tarewa Road, Otaika, Whangarei				
Maximum Roll	100				
Year Level	2015	2016	2017	2018	2019
1	10	15	20	20	25
2	10	10	15	20	20
3	10	10	10	15	20
4	5	10	10	10	15
5	5	5	10	10	10
6		5	5	10	10
Total	40	55	70	85	100
% Roll Growth (YoY)		38%	27%	21%	18%

62. He Puna Marama Charitable Trust (He Puna Marama) was established in Whangarei in 1997. He Puna Marama has owned and operated bi-lingual early childhood centres for a number of years. The applicant opened a year 9 to 13 Kura Hourua in February 2014 and has prior approval to extend this to a year 7 to 13 school.

63. This proposal is to open a year 1 to 6 school in Whangarei City. The school would enrol 40 students in 2014, growing to 100 in 2019.
64. He Puna Marama is explicit about ultimately wanting to offer an education pipeline from age 0 through to adulthood. The proposed school would provide a suitable option for tamariki coming out of early childhood centres, and for whanau who wish to have their child in a Māori kaupapa-based kura. It would also provide a stream of graduates to move on to the secondary school.
65. The application assumed some prior knowledge of their existing Kura Hourua, and was light in detail in some areas. However the Board is impressed with the way in which the current kura was established and is operating, and has confidence in the applicant's capability and the vision and goals they espouse.
66. The application has a clear focus on Māori learners and makes strong links with existing provision. It is the only application that would effectively result in providing the benefits of seamless year 0 to 8 provision.
67. A strong case was made for the proposed curriculum and teaching and learning approach based on the school's vision and affirmation of cultural identity.
68. The school would have the support of an experienced organisation that has existing infrastructure.
69. The Board did, however, have some reservations about the application, notably about the proposed small size of the school in terms of value for money, and the cost of the proposed property development. s 9(2)(i) OIA

70.



71. Referees were contacted by the Board. No issues of concern were raised.

72.



s 9(2)(i) OIA

Key points for further discussion

73. For each of these recommended applicants, there are issues and risks that would need to be worked through during negotiations. Negotiation plans for each applicant will be developed once you have made your decision. A list of the key areas for further discussion for each recommended applicant are included in the table below:

Applicant	Key areas where plans are required
MUMA	<ul style="list-style-type: none"> • Appointment of experienced education leadership
PPAT	<ul style="list-style-type: none"> • Appointment of experienced education leadership • Recruitment of project management expertise to manage the work required to establish the school • Moving toward self-sufficiency within the first year including school curriculum development, and receiving Consent to Assess status from NZQA
Ngā Kākano	<ul style="list-style-type: none"> • Professional and school curriculum development, including transitioning from use of the ACE curriculum to the New Zealand Curriculum • Recruitment of experienced teachers • In relation to their existing property, how they will cater for expanded numbers • Work towards receiving Consent to Assess status from NZQA
Villa	<ul style="list-style-type: none"> • Assurance that sufficient expertise and resources are in place to ensure that developing the new school will not put the existing school/s at risk • Contingency planning is in place if for any reason the two key people become unavailable
He Puna Marama	<ul style="list-style-type: none"> • Appointment of experienced education leadership • Assurance that sufficient resources are in place to ensure that adding primary classes will not put the existing school at risk

Applications to be declined

74. The Ministry has advised the 11 applicants that did not progress to interview stage that their application has been unsuccessful.
75. Following the interview stage, the Board recommends a further three applications to operate a Partnership Kura in 2015 do not proceed to the next stage. More detail on the unsuccessful applicants is listed below.
76. Unsuccessful applicants will be offered an opportunity for a debrief either in writing or face to face (for those interviewed).

Auckland City Training School (ACTS)

77. This is a proposal for a year 1 to 8 school in Manukau starting with 50 students in 2015 and growing to 300 students in 2019. ACTS is a private training establishment and is the education ministry of Equipppers Church. The focus is on Māori and Pasifika learners.
78. The Board felt the applicant had good credentials and was well intentioned, but was not convinced that it had the depth of understanding of what it would take to establish and successfully operate a Partnership Kura. The Board noted that the applicant's experience was primarily with secondary students and youth, rather than the primary sector. It was also concerned that their proposed teaching strategies were not well developed and felt the proposal overall was not strong academically.

Creators Collaborative Trust

79. This is a proposal for a year 1 to 10 school on the Rotokauri Wintec campus in Hamilton, starting with 75 students in 2015 and growing to 410 students in 2019, and 560 students in 2022. Since the interview the Trust has informed the Ministry that they are happy for the application to be considered as a two-stage process starting with a year 0 to 8 primary school with a roll of 330 students. The school would have a focus on the needs of Māori learners in particular.
80. The Board had significant concerns about the applicant's lack of experience and understanding of what it would take to establish and operate a Partnership School and the required educational leadership and capability that it would take.
81. The Board was also concerned about how connected the applicant was with the local iwi and the Māori community in general.

Te Kōhao Health Limited

82. This is a proposal for a year 1 to 6 school based in Hamilton starting with a roll of 60 in 2015 and growing to 100 in 2019. Its focus would be on Māori learners. The applicant has significant experience in a number of areas including early childhood education, social services and health.
83. The Board was well disposed towards this application but at interview was disappointed to find that, notwithstanding the feedback provided on their 2013 application, the applicant had still not fully understood the requirements and rigour needed to establish and operate a school, and could not demonstrate it had the governance, educational leadership and capability that would be needed.

General comments on the applications

84. In general, the applications are of higher quality and reflect a greater understanding of the Partnership Kura requirements compared with the first round. The Board was pleased to see that a number of the 2013 applicants who have submitted a further application have taken into account the feedback they received.
85. The Board noted that a number of the applications were strong in one or two of the domains being assessed, but were weaker in other areas. Resource constraints and the challenge of not being able to recruit key personnel or lease premises until an application is approved were also evident. The Board considers that in developing their proposals applicants would benefit from the experience of existing Partnership Kura. It is possible that some form of PSKH network organisation will evolve over time. This is something the Board would encourage.
86. It was further noted that more widely and readily available information about the initiative and the nature and progress of existing Partnership Kura would assist other organisations with the potential to establish successful Partnership Kura in understanding the opportunities the model presents.

Partnership Schools | Kura Hourua

**Ministry of Education PSKH Support Team
Assessment of PSKH Applicants Interviewed by
Authorisation Board and Ministry of Education**

29 May 2014

Content

1	AUCKLAND CITY TRAINING SCHOOL.....	3
1.1	OVERVIEW.....	3
1.2	SUMMARY OF AUCKLAND CITY TRAINING SCHOOL PROPOSAL.....	3
1.3	DUE DILIGENCE: REVIEW OF APPLICANT ORGANISATION.....	4
1.4	ANALYSIS OF APPLICATION.....	5
2	CREATORS COLLABORATIVE TRUST.....	9
2.1	OVERVIEW.....	9
2.2	SUMMARY OF CREATORS EDUCATIONAL TRUST PROPOSAL.....	9
2.3	DUE DILIGENCE: REVIEW OF APPLICANT ORGANISATION.....	10
2.4	ANALYSIS OF APPLICATION.....	11
3	HE PUNA MARAMA TRUST.....	14
3.1	OVERVIEW.....	14
3.2	SUMMARY OF HE PUNA MARAMA PROPOSAL.....	14
3.3	DUE DILIGENCE: REVIEW OF APPLICANT ORGANISATION.....	15
3.4	ANALYSIS OF APPLICATION.....	16
4	MANUKAU URBAN MĀORI AUTHORITY.....	19
4.1	OVERVIEW.....	19
4.2	SUMMARY OF MANUKAU URBAN MĀORI AUTHORITY PROPOSAL.....	19
4.3	DUE DILIGENCE: REVIEW OF APPLICANT ORGANISATION.....	20
4.4	ANALYSIS OF APPLICATION.....	21
5	NGĀ KĀKANO O TE KAIHANGA KURA.....	25
5.1	OVERVIEW.....	25
5.2	SUMMARY OF NGĀ KĀKANO PROPOSAL.....	25
5.3	DUE DILIGENCE: REVIEW OF APPLICANT ORGANISATION.....	26
5.4	ANALYSIS OF APPLICATION.....	27
6	PACIFIC PEOPLES' ADVANCEMENT TRUST (PPAT).....	31
6.1	OVERVIEW.....	31
6.2	SUMMARY OF PPAT PROPOSAL.....	31
6.3	DUE DILIGENCE: REVIEW OF APPLICANT ORGANISATION.....	33
6.4	ASSESSMENT OF APPLICATION.....	34
7	TE KOHAO HEALTH LIMITED.....	38
7.1	OVERVIEW.....	38
7.2	SUMMARY OF TE KOHAO HEALTH PROPOSAL.....	38
7.3	DUE DILIGENCE: REVIEW OF APPLICANT ORGANISATION.....	39
7.4	ANALYSIS OF APPLICATION.....	40
8	VILLA EDUCATION TRUST.....	44
8.1	OVERVIEW.....	44
8.2	SUMMARY OF VILLA PROPOSAL.....	44
8.3	DUE DILIGENCE: REVIEW OF APPLICANT ORGANISATION.....	45
8.4	ASSESSMENT OF APPLICATION.....	46

1 Auckland City Training School

1.1 Overview

Applicant	Auckland City Training School
School name	Equippers School
Vision/Mission	Creating Champions. The purpose of Equippers School is to equip children to become champions through creative education and caring relationships.
Target students	Students from low socio-economic backgrounds Māori students Pasifika students
Location	13-15 Gladding Place, Manukau
Number of students (max)	300
Special character	Faith Based - Christian
Curriculum	New Zealand Curriculum
Key Persons	Adrian Schoone – General Manager
Year level	Y1-8 Opening with Y1-5 initially; adding Y6-7 in 2 nd year of operation and Y8 in the 3 rd year.

1.2 Summary of Auckland City Training School proposal

Auckland City Training School (ACTS), a private training establishment and Charitable Trust, is the education ministry of Equippers Church. The Trust's purpose is to develop people's potential through education, creative arts training and Christian Ministry. ACTS trades as Creative Learning Scheme (CLS) and Equippers College, a Christian Ministry college.

CLS was established in 1997 to provide alternative education to a growing number of youths from church who were not attending school. Located in Mercury Theatre, students were taught secular curriculum of literacy, numeracy, life skills and creative arts. CLS is New Zealand's largest single provider of alternative education and has five centres serving 135 students. CLS has held a contract with the Ministry to provide education to the residents at two South Auckland Child Youth and Family (CYF) residences: Whakatakapokai and Korowai Manaaki in addition to providing Youth Guarantee programmes to 25, 16-18 year olds in Manukau, Auckland.

ACTS works mainly with students from Priority groups throughout its various programmes, of which 85% of students are Māori and Pasifika many of which have special learning needs.

They are proposing to establish their Partnership Kura in Manukau, Auckland, to serve Years 1-8 with an initial starting roll of 50, growing to a maximum roll of 300 by 2019.

Equippers School are proposing to establish a full primary school by Auckland City Training School that will be providing progressive and creative education to students in the heart of Manukau City. Recruiting students who live in Manukau City, Manukau Heights and the Flat Bush area, the school's vision is to develop a learning community that extends to embrace parents, caregivers and to meet the education needs arising from the growing population demands of Manukau City.

To achieve their vision they will employ qualified and registered teachers with the appropriate skills to deliver their curriculum and specialist tutors. The schools performance objectives are based around all students achieving at or above the National Standards for reading, writing and mathematics and they plan to track towards 85% of students achieving these standards over three years.

In five years Equippers School will be known for improving the academic success of all its students, notably Pasifika and Māori students. In ten years Equippers Schools will open in other 'high needs' areas across New Zealand.

1.2.1 Priority Learner Groups:

Māori	100 *
Pasifika	120
Low socio economic	250
Special Education	10

**Roll of 480 expected to be achieved after the first six year contract term.*

The school will target the Government's Priority groups with a majority of students being Pasifika or Māori.

1.2.2 Educational Track Record of the Sponsor:

ACT has a proven track record of offering innovative educational solutions to Government priority groups. Equippers School is drawing intellectual knowledge and business capability from this work. They have a long standing positive relationship with the Ministry and the Trust is committed to providing education services for the long term.

ACT has intellectual, governance and management capability to run a highly innovative and successful partnership school and have worked in the area of education in with the Manukau community for the past 16 years, through the CLS scheme and since 2011, the Incredible Years Parenting programme as well as school holiday programmes run by the church.

1.3 Due Diligence: Review of Applicant Organisation

Section	Subsection	RAG	Comment
Organisational profile	Overall	Green	Registered Charitable Trust
	Year established		1996
	No of Staff		70
	No of Locations		2
Company Overview	Overall	Green	Auckland City Training School also trades as Equippers College, a Christian ministry college which provides certificate and diploma courses. Auckland City Training school mainly works with students from priority groups. Equippers Church, Auckland City Training School's 'parent company' is a multicultural contemporary church with a long-term commitment to providing education.
Commitments	Overall	Green	Multiple MoE contracts for Education services in CYF centres and Incredible Years. College contracts supplying Alternative Education services and provisions for Felix Donnelly Students. Youth guarantee TEC contracts.
Probity	Overall	Green	Nothing of concern noted.
Nominated Partners	Overall	Green	No subcontractors noted. s 9(2)(b)(ii) OIA
Financial Summary	Overall	Amber	[REDACTED]

	Accounts provided		Yes – compliant response
Quality Assurance	Overall	Green	NZQA Accredited (Parent education programme, within the next five years, Auckland City Training School (NZQA Accredited) will offer free NCEA literacy to the community)
Health and Safety	Overall	Amber	ACT Policy will be adopted by Equippers School*
	Written EHS Policy		As above*
	Formal EHS training		As above*
	Emergency Procedures plans		As above*
Referees	Overall	Green	ACED; Te Atatu Intermediate School, Principal; CYF (Ex) Family Manager
	No of Referees provided		3

*Will form part of the contract negotiation if successful.

1.4 Analysis of Application

Strengths	<p>The applicant appears to have a strong educational track record, providing diverse programmes within their community.</p> <p>The applicant owns the proposed site, which is currently being used to deliver alternative education and training. Renovations are required and they plan to seek Crown assistance to meet these costs.</p> <p>Key targets presented in the school's vision appear in line with contractual requirements, suggesting some knowledge of the contractual process for becoming a Partnership School.</p> <p>The application demonstrated strong community and whanau partnerships.</p>
Weaknesses	<p>No compelling rationale for opening the proposed school, supported by evidential data.</p> <p>Does not provide a clear, evidence-based argument that the proposed methods will support improved outcomes for priority learners. Further information on how the curriculum will be delivered would have benefitted. Assessment for learning strategies was underdeveloped.</p> <p>The application did not present clear plans for achieving success for Māori and Pasifika students, and did not demonstrate a strong understanding of these priority learners. Support for Pasifika learners was underdeveloped.</p>
Ministry Assessment	<p>Section 1: Mission and Vision</p> <p><i>a) Rationale:</i></p> <p>The applicant did not use evidential data to make a clear and compelling case for establishing this school. The stated rationale for establishing the school is based on providing additional choice for the growing population in Manukau through creative pedagogy informed by Christian values, and it was unclear how the school would be differentiated from other provision in the area.</p>

b) Focus on Priority Students

The school proposes to cater for priority learners in Manukau, particularly in relation to addressing social barriers to achievement. However, the mission and vision section did not contain a clear, evidence-based argument to support improved outcomes for priority learners, or adequately describe how the school would meet an identified need in the community.

c) Sponsor's track record

The sponsor appears to have an extensive track record in delivering education and community services to priority students, including the Creative Learning Scheme and Incredible Years Parenting programmes. It is a large provider of Alternative Education in the local area.

Section 2: Educational Plan**a) Curriculum and Teaching**

The applicant proposes to use the New Zealand Curriculum, supplemented by a broad framework of Christian values. Generally clear and detailed plans for the delivery of the curriculum are included in the application. Further information about assessment strategy and practice would have benefitted this section. The application was not strong educationally, despite the applicant's track record in this area.

b) Support for priority learners

The applicant did not clearly describe how its proposed methods would meet the needs of priority students, and plans for achieving success were not clear. Plans to support Māori and Pasifika students are underdeveloped and did not demonstrate the applicant's understanding of the needs of these students.

c) Partnerships

The applicant demonstrated a number of planned partnerships with key organisations within the community, and appears to have developed key links through their existing operations. While this could have been presented more strongly in the application, there appears to be sufficient evidence of the sponsor's involvement in the local community.

Section 3: Business Plan**a) Governance**

An organisational chart showing school governance and accountabilities was provided in the application, as was basic information about the roles of different actors. Information about how governance would work on a day-to-day basis would have benefitted.

b) Finance

The financial response did not include a completed balance sheet. However, the proposed cash budget appeared logical and complete. Full assumptions for proposed costs were not included.

Establishment funding was overestimated by approximately \$200,000, although the response correctly calculated the funding that would be provided once the school was established. The sponsor does not propose to provide additional funding to that provided by the Crown.

Registered teachers account for over 80% of the proposed teaching staff, with

teacher aides accounting for the remainder of unregistered staff. The student-teacher ratio is approximately 17:1 in the first year and rises to 20:1 when the school reaches its maximum roll.

Overall, direct learning costs account for slightly over 50% of the total budget, with an almost even split of overheads and property costs at approximately 25% each.

c) Premises

The applicant owns a building that appears fit for purpose, subject to some minor renovation. The proposed premises are currently being used for the organisation's existing services and much of the existing infrastructure is in place. The applicant is confident that only minor modifications are needed to make the site fit for purpose. The applicant plans to seek Crown funding assistance for these renovations.

A clarification question was issued to the applicant about the accessibility of the site given its location in a light commercial area. The response stated that it was expected that commuting parents/whānau would drop students off by car, or students could walk to the site. The applicant also proposes to separate primary and secondary students and management would monitor the premises daily to ensure student safety.

Section 4: Operational Plan

a) Enrolment

The specified enrolment plan is compliant with section 158N of the Education Act 1989, which specifies enrolment in Partnership Schools. The applicant proposes to achieve by targeting families identified through the sponsor's existing operations, the Equippers Church congregation and through the sponsor's affiliated charitable trusts.

b) Other operations

The operational plan was a weakness of the application. The applicant supplied a range of prospective school policies, but answers to questions were often too high-level in their approach and it was not clear how policies would be put into practice in the school. This section did not demonstrate the organisational capacity and capability of the sponsor.

Overall Comment:

The application was mixed overall. Strengths included the sponsor's track record in delivering educational and community services to priority learners, as well as clear plans for premises. However, there were concerns about the strength of the educational offering, which runs counter to the applicant's track record. The applicant ensured that the proposal was consistent with the contractual obligations of Partnership Schools in terms of meeting targets and the enrolment policy, which demonstrates an understanding of the process. Some concerns about the accessibility and financing of the site remain. On balance, the application was considered to warrant further investigation at interview on the basis of the sponsor's track record, with questioning to focus on the educational and site aspects of the proposal.

s 9(2)(g)(i) OIA



s 9(2)(g)(i) OIA

2 Creators Collaborative Trust

2.1 Overview

Applicant	Creators Collaborative Trust
School name	EPIC Academy
Vision/Mission	To inspire greatness in students and whānau to achieve highly as transformative leaders in their community and in a global context.
Target students	Students from low socio-economic backgrounds Māori students
Location	Rotokauri Wintec Campus, Avalon Drive, Hamilton (TBC)
Number of students (max)	560 (in 2022)
Special character	Bicultural, whānau focused
Curriculum	Bicultural curriculum – aligned to the New Zealand Curriculum
Key Persons	Rick Fourie – Chairperson Jane Bisset, Joseph Graham, Dr Paul Wood, Rebekah Graham
Year level	Y1-10 Opening with Y1-6 initially; adding Y7 in the 2 nd year of operation, Y8 in the 3 rd , Y9 in the 4 th and Y10 in the 5 th year.

2.2 Summary of Creators Educational Trust proposal

Creators Educational Trust established in 1996, is a charitable trust that specialises in the delivery of educational programmes for young New Zealanders.

They operate an Early Childhood Centre, catering for 90 families; a Home based Early Childhood Service, catering for 35 families and OSCAR programmes catering for 100 families, in Hamilton, Rotokauri and Hautapu.

Creators who will be trading as EPIC Academy, are proposing to commence with Year 0-6 as stage 1 and grow progressively over the next six years to serve Y0-13 which includes a ECE service on Campus to eventually serve 0-18 year olds.

Their students will come from low SES backgrounds, be predominantly Māori, alongside Pākehā and some Pasifika families. They have identified a significant achievement gap between students from low SES backgrounds in Hamilton, and those from higher SES backgrounds. These students are achieving well below the national average in National Standards across the board.

EPIC Academy is a targeted response to the identified local need. Their highly experienced foundational Board of Trustees brings together a collaboration of educational services and relationships from a wide spectrum of society that has served local families effectively.

2.2.1 Priority Learner Groups:

Māori	245
Pasifika	30
Low socio economic	145
Special Education	20

2.2.2 Educational Track Record of the Sponsor

For the purposes of the Partnership School proposal they say it's of particular importance to establish a new trust, governed by influential community leaders who have extensive experience in providing education and welfare for low SES families.

EPIC propose specialist contractors will work alongside their teachers to deliver a high quality curriculum. Instead of employing them as staff of the school they feel it would be more appropriate to pay them as independent contractors.

2.3 Due Diligence: Review of Applicant Organisation

Section	Subsection	RAG	Comment
Organisational profile	Overall	Green	Registered Charitable Trust
	Year established		1996
	No of Staff		35
	No of Locations		Operates in Hamilton, Rotokauri and Hautapu
Company Overview	Overall	Green	Largely dormant until 2008, when the Trust established three OSCAR programmes in Hamilton. Childcare Centre founded in 2010. Home-based childcare established in 2012.
Commitments	Overall	Green	Six OSCAR programmes now cater for 100 families. ECE catering for 90 families, with negotiations underway to establish another. Home-based childcare catering for 35 families. Contracts with MoE (Centre and home-based childcare) and MSD (OSCAR programmes).
Probity	Overall	Green	Nothing of concern noted.
Nominated Partners	Overall	Green	Individuals will be contracted in to work alongside teachers to deliver specialist subjects.
Financial Summary	Overall	Green	No particular areas of concern. Consolidated revenues and expenditure consistent with proposed funding of Partnership school
	Accounts provided		Accounts for each of the consortia organisations provided – compliant response
Quality Assurance	Overall	Amber	Positions advertised will be identified by the needs of the school which will include the teaching expertise and experience needed for instruction in NZQA standards – there is no other mention*
Health and Safety	Overall	Green	Yes
	Written EHS Policy		Yes
	Formal EHS training		Yes
	Emergency Procedures plans		Yes
Referees	Overall	Green	Holy Trinity Forest Lake Vestry; Life Community Services; Christian Education Trust and Principal of Chapman College; Adventure Education (PTE Are Manager)
	No of Referees provided		4

*Will form part of the contract negotiation if successful

2.4 Analysis of Application

Strengths	<p>The mission and vision was clear, compelling, aspirational and focused on providing improved outcomes for priority students.</p> <p>The educational plan was strong and provided strong supporting evidence to support the proposed approach to teaching and learning.</p> <p>Members of the applicant group have strong community links and appear to have an extensive track record.</p> <p>The school's plan for assessment was highly detailed, effective and reflective of best practice. Measurement of student progress and achievement was covered in detail and suggested knowledge of best practice.</p> <p>The application focused on the needs of Māori learners and showed a good understanding of how to overcome the barriers to engagement for these students.</p> <p>Community engagement and partnerships were covered in detail and suggested grounding in the community.</p>
Weaknesses	<p>The application was less clear on how it would meet the needs of Pasifika learners and students with special educational needs, and further information would have benefitted.</p> <p>It was not always clear whether the application was a community-driven response to an identified educational need, and plans for including parents and whanau in governance were less clear.</p> <p>It was not clear whether adopting a five-framework educational approach would contribute to a coherent educational offering.</p> <p>Operational and business plans were comparatively weaker than the mission and vision and educational plans.</p>
Ministry Assessment	<p>Section 1: Mission and Vision</p> <p>a) <i>Rationale:</i></p> <p>The school intends to provide a unique bicultural option for students from low socio-economic backgrounds in Hamilton by combining te reo Māori with the Reggio Emilia self-directed learning philosophy. The application makes a clear case for the need for the school based on barriers to achievement through the use of evidential data. However, it is less clear about how the school would provide improved outcomes for priority students and the benefits of the Reggio Emilia approach are not stated clearly.</p> <p>b) <i>Focus on Priority Students</i></p> <p>The school is clearly focused on priority learners in Hamilton, particularly Māori. It is also expected to cater for smaller numbers of Pasifika and students with special educational needs. While the focus was clear, evidence to support that the school would provide improved outcomes for priority was not presented effectively.</p> <p>c) <i>Sponsor's track record</i></p> <p>The sponsor organisation provides educational services, including OSCAR after-school care and ECE provision. Key members of the sponsoring organisation include educational consultants and staff of Te Wānanga o Aotearoa. Evidence to</p>

support the stated track record was not presented clearly in the application.

Section 2: Educational Plan

a) Curriculum

The proposed curriculum is the New Zealand Curriculum, supported by the principles of the Reggio Emilia approach to independent learning. Art and design are key aspects of the educational offering, and students would be encouraged to customise their individual learning plans to more accurately reflect their interests. The educational plan was thorough and well-evidenced throughout, although the multiple learning frameworks may detract from the coherence of the offer. Strong plans to support and manage student transitions were provided.

b) Support for priority learners

The application presents reasonable plans to support Māori students within the school, including provisions for upholding and maintaining cultural identity. Tikanga and te reo Māori is a key aspect of the learning environment, and students are likely to be well-supported culturally. The application is less clear about how Pasifika and students with special educational needs would be provided for within the school.

c) Partnerships

The sponsoring organisation has established links to community agencies through their existing operations, including wraparound services. The proposed relationship with Wintec and Te Wānanga o Aotearoa was not clearly explained in the application. Clarification questions were issued to the applicant requesting further detail on planned partnerships. The response highlighted a number of existing positive relationships with community organisations and clarified that the proposed relationship with Wintec and Te Wānanga o Aotearoa was partnership-based and would be formalised through a Memorandum of Understanding if the school was approved to open.

Section 3: Business Plan

a) Governance

The application included a detailed organisational chart and a narrative section highlighting the roles and key accountabilities of different layers of government and management. The proposed management structure includes a "school director" position above the educational director and pastoral care lead.

b) Finance

The application included a full financial response with each section completed to an acceptable standard, although more detail around the assumptions underpinning costs would have benefitted this section.

The response underestimated Crown funding by 40% over the first four years of operation, the majority of which appears to have been due to calculating the property component on each year's expected roll rather than the maximum roll. The sponsor proposes to contribute \$40,000 to support the establishment of the school, and intends to generate an additional 11% in revenue through fundraising and related activities.

Registered teachers account for over 80% of the proposed teaching staff, with teacher aides accounting for the remainder of unregistered staff. The student-

teacher ratio consistently ranges between 1:23 and 1:25.

Overall, direct learning costs account for 50% of budget, and property costs and overheads at 19% and 29% of total costs respectively in 2018.

c) Premises

The applicant set out in detail a range of site options. The preferred site is identified as the Wintec Rotokauri campus, which would provide easy access to the tertiary institution for students. A clarification question was issued asking for the current status of negotiations (if any) around the preferred site, the response to which indicated that a draft lease could be prepared should the applicant proceed to interview.

Section 4: Operational Plan

a) Enrolment

The proposed enrolment policy is compliant with section 158N of the Education Act 1989. The school plans to attract students from across Hamilton, but an indication of likely demand was not provided.

b) Other operations

The operational plan was a weakness of the application. Answers were often too high-level in their approach and it was not apparent how policies would be put into practice in the school. This section did not demonstrate the capacity and capability of the sponsor in running a successful school.

Overall Comment:

The application was thorough and professionally-presented, and evidential data was used effectively to make the case for the school. The Reggio Emilia approach and bilingual focus gives it a point of difference, although the benefits of this approach were not always clear. There were some concerns about the coherency of the educational offering, as multiple frameworks were proposed to be used. It was also unclear about the roles of Wintec and Te Wānanga o Aotearoa in the proposal, and answers clarification questions did not allay concerns. Further information about the sponsor's links to the community is required. On balance, the application was considered strong enough to forward to interview.



s 9(2)(g)(i) OIA

3 He Puna Marama Trust

3.1 Overview

Applicant	He Puna Marama Trust
School name	Te Kāpehu Whetū
Vision/Mission	Tu kit e marae....Tu kit e Ao (I can stand on the marae....I can stand in the world. Unlock the potential of our rangatahi while honouring the deeds of our tupuna
Target students	Māori students
Location	78 Tarewa Road, Otaika, Whangarei
Number of students (max)	100
Special character	Kaupapa Māori
Curriculum	Te Marautanga o Aotearoa
Key Persons	Raewyn Tipene - CEO
Year level	Y1-6 Opening with Y1-5 initially; adding Y6 in 2 nd year of operation.

3.2 Summary of He Puna Marama proposal

The He Puna Marama Trust established in 1997 is based in Whangarei. The Trust has owned and operated bi-lingual early childhood centres for the last sixteen years and currently has four centres (Whangarei x2, Moerewa, Manurewa) and a fifth currently being built. The Trust has operated a Leadership Academy for Māori Boys and opened one of the first Kura Hourua in the country.

The Trust is a key contractor of the Government and has held the same education contracts, Parents as First Teachers and Engaging Priority Families (previously Promoting Participation), for the last thirteen years and eight years respectively. Both programmes are mobile services working in the community.

The Trust is proposing to open a Kura Teina (6-10yrs) for 3 reasons:

- To provide a suitable choice for tamariki coming out of Mokopuna early childhood centres and for Māori whanau who wish to have their child in a Māori kaupapa based kura that recognise the need to prepare their child for a new 21st century, global world.
- To provide a stream of graduates to move on to the Kura Tuakana (11-18yrs) who have experience learning in a Māori kaupapa based 21st century environment where they may progress at their pace, focused on learning that is important to them.
- To compound further the value of Partnership schools in the Māori education landscape.

3.2.1 Priority Learner Groups:

Māori	100%
Pasifika	0
Low socio economic	0
Special Education	0

3.2.2 Educational Track Record of the Sponsor:

The Trust has been providing bilingual/Māori immersion education for sixteen years to whanau in Whangarei, Tai Tokerau and more recently South Auckland. They own and operate four early childhood centres, long term Ministry contracts and a hostel based secondary focused Leadership Academy for Māori youth.

The Trust has 29 qualified teaching staff that have taught from early childhood, primary and secondary. They have built up an extensive network of teachers, educators and education agencies to call on for support, including Principals, Deans, specialist subject teachers, RTLBs, special education staff and Ministry of Education staff

3.3 Due Diligence: Review of Applicant Organisation

Section	Subsection	RAG	Comment
Organisational profile	Overall	Green	Registered Charitable Trust
	Year established		1997
	No of Staff		58
	No of Locations		8
Company Overview	Overall	Green	Originally ECE, in 2008 started leadership academy for building Māori leaders and in 2014 opened one of the first round Partnership schools.
Commitments	Overall	Green	Parents as First Teachers (PAFT) for the past thirteen years, Engaging Priority Families (formerly Promoting Participation) for the past eight years. Four licensed ECE centres with a fifth centre planned.
Probity	Overall	Green	Nothing of concern noted.
Nominated Partners	Overall	Green	No subcontractors noted.
Financial Summary	Overall	Green	Accounts provided as at end of March 2013, and as such does not include current Partnership Kura funding. [REDACTED]
	Accounts provided		Yes s 9(2)(b)(ii) OIA
Quality Assurance	Overall	Green	The Kura Hourua met all timelines for starting in the 4 month period and received sign off from ERO, from NZQA for CAAS and policy requirements from the Ministry.
Health and Safety	Overall	Green	Yes
	Written EHS Policy		Yes
	Formal EHS training		Yes
	Emergency Procedures plans		Yes
Referees	Overall	Green	ASB Community Trust; Hihiaua Trust; Whangarei District Council
	No of Referees provided		3

3.4 Analysis of Application

Strengths	<p>The application had a clear focus on the needs of Māori learners, and made strong links with existing provision.</p> <p>The Sponsor has an extensive and proven track record in delivering education to priority learners. The Trust is the Sponsor of an existing Partnership Kura and is a long-established PTE organisation.</p> <p>A clear case for the curriculum and the proposed approach to teaching and learning was made, based on consistency with the school's vision and affirmation of cultural identity. However, it is less clear how this will translate into improved outcomes for students.</p> <p>The curriculum is clearly aligned with the school's vision and it's aspirations for Māori learners.</p>
Weaknesses	<p>The mission and vision section was not strong and appeared to undersell the uniqueness of the proposed school.</p> <p>The proposed school roll is small, and may cause issues around viability.</p> <p>The business and operations plan were comparatively weaker and did not demonstrate the capacity and capability of the sponsor, particularly around their understanding of staffing matters.</p>
Ministry Assessment	<p>Section 1: Mission and Vision</p> <p><i>a) Rationale:</i></p> <p>The rationale for establishing this school is based on the continuation of existing provision, and to provide a bridge between ECE and secondary schooling delivered by the sponsor. The mission and vision section of this application was weak in comparison to other sections, and did not make a clear and compelling evidence-based argument for the school.</p> <p><i>b) Focus on Priority Students</i></p> <p>The proposed school clearly focuses on the needs of Māori students in Whangarei, but did not adequately present these needs clearly in the mission and vision section. Although the focus remains clear, it was unclear how the proposed school would meet students' needs and provide for improved outcomes as evidence was not provided in support of this. The sponsoring organisation has experience in delivering educational services to priority learners.</p> <p><i>c) Sponsor's track record</i></p> <p>The sponsor has a track record in providing Māori education services, including a network of ECE centres, an existing year 7-13 Partnership School and the Leadership Academy of 'A Company'. The sponsor has developed processes and policies in line with the requirements of operating a school, and is able to draw on organisational capacity and capability to support their operations. However, the existing Partnership School is still in the build-up phase and adding an additional school to their network could place strain on the organisation.</p> <p>Section 2: Educational Plan</p> <p><i>a) Curriculum and teaching</i></p> <p>The proposed curriculum is Te Marautanga o Aotearoa, which is consistent with</p>

the principles of the Treaty of Waitangi and the tikanga of the sponsor organisation. The learning framework is described as “Be Māori, Be Educated, Be Rangatira” and detailed information is provided to ensure that this will occur in practice. The educational plan is thorough in describing the sponsor’s approach to teaching and learning, but could have benefitted from a stronger evidence base.

b) Support for priority learners

The application presents robust plans to support Māori students within the school, including providing for upholding and maintaining cultural identity. Tikanga and te reo Māori is a key aspect of the learning environment, and students are likely to be well-supported culturally in this environment. Pastoral care for students with special educational needs is covered at a high level, but could have benefitted from further information about how support would be provided on a day-to-day basis.

c) Partnerships

The sponsor has existing relationships with community organisations and will likely have strong links through their existing operations. However, this is not apparent from the application as questions relating to partnerships are only briefly covered and do not communicate the required information.

Section 3: Business Plan

a) Governance

An organisational chart was provided in the application, but there was no explanation about the roles and responsibilities for positions within the structure. More information about how governance and management would operate in relation to the sponsor’s existing provision is required.

b) Finance

The application included a full financial response with each section completed to an acceptable standard, although more detail around the assumptions underpinning costs would have benefitted this section.

The financial response accurately estimated the available government funding over each year of operation. The sponsor has not proposed to provide any additional funding. However it is anticipating using establishment funding to supplement the development of the proposed property (through purchase of learning resources, furniture and ICT provision).

All teachers will be registered. The student-teacher ratio averages 18:1 across all years of operation.

Overall, direct learning costs equal 47% of the total budget, and property costs and overheads at 11% and 42% of total costs respectively by 2018.

c) Premises

The proposed location for the school is on existing leased space that also houses the Sponsor’s ECE provision. The application cites supporting transitions as a key rationale for selecting this site. Resource consent is stated as being in place. The sponsor may utilise prefabricated buildings to manage growth. The sponsoring trust’s property company intends to extend its loan with the bank and lease to the Partnership School.

Section 4: Operational Plan

a) Enrolment

A two-tier enrolment policy is proposed, with the process differing depending on whether an applicant is in-zone or out of zone. This is not compliant with section 158N of the Education Act 1989, as Partnership Schools are unable to specify enrolment zones and must accept all enrolments until they meet their maximum roll.

Enrolments would initially be obtained through transitioning students from the sponsor's existing ECE centres, which poses a risk that preferential treatment would be given to these students. This was clarified with the applicant, who responded by stating that they expect to fill enrolments from within their existing educational whānau due to familiarity with the school's kaupapa. This has not allayed the concern that the school would not operate in keeping with an open, accessible enrolment policy.

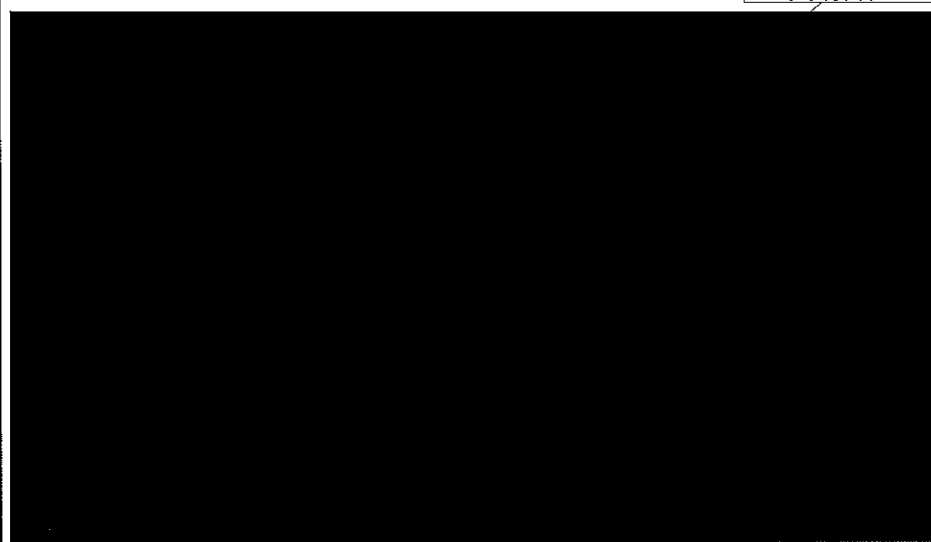
b) Other operations

The operational plan was mixed overall, with strengths in processes for the recruitment of staff. However, some questions were not answered adequately and tended towards high-level statements rather than clear plans for implementation, which did not demonstrate the capacity and capability of the organisation.

Overall Comment:

The proposed Sponsor has an extensive track record in education, and has proven their ability to establish a new school in a short timeframe. However, the application was mixed overall, with some strong sections (including the thoroughness of curriculum and teaching plans) and some questions not answered completely. While the sponsor has proven educational capability, it could place strain on its existing operations if another school was added to the portfolio. There are also questions around the enrolment of students and access for the wider community. On balance, the proposal is considered strong enough to progress to the interview stage to investigate the highlighted issues further.

s 9(2)(g)(i) OIA



4 Manukau Urban Māori Authority

4.1 Overview

Applicant	Manukau Urban Māori Authority
School name	Te Poutoko Manawa
Vision/Mission	Through the provision of a culturally enriched, safe and whānau-centric learning environment, we will assist our learners and their whānau to develop a love of learning together. They will be eager and deeply engaged in their unique journeys of exploration and self discovery.
Target students	Students from low socio-economic backgrounds Māori students
Location	Nga Whare Waatea Marae, 31 Calthorpe Close, Mangere
Number of students (max)	155
Special character	Kaupapa Māori
Curriculum	Curriculum based on Kaupapa Māori and Steiner principals and aligned to the New Zealand Curriculum
Key Persons	Wyn Osborne – Project Leader Willie Jackson – Project Sponsor Tania Rangihueua – Education Advisor Steve Hutana – Architect and Build Project Manager Frances Smiler-Edwards – Project Support Marama Davis – Bi-Cultural Teacher Tamara Dias – Finance Manager
Year level	Y1-8 Opening with Y1-4 initially; adding Y5 in the 2 nd year of operation, Y6 in the 3 rd , Y7 in the 4 th and Y8 in the 5 th year.

4.2 Summary of Manukau Urban Māori Authority proposal

The Manukau Urban Māori Authority (MUMA) was established in 1985 to represent the interests of urban Māori in South Auckland, by a group of first generation urban Māori from diverse tribal backgrounds, to meet the development needs of their community.

MUMA have been successful in securing contracts from the Ministry of Education, Te Puni Kokiri, Ministry of Social Development, Department of Corrections, Ministry of Justice, Ministry of Health, They cover a gambit of education, early childhood, youth, social work, justice, etc.

MUMA is proposing a bilingual school Years 1-8, as they see there is a clear need in the Mangere community and they recognise that they have a vested interest in the Māori Education Strategy Ka Hikitia Accelerating Success 2013-2017. The principles indicated in Ka Hikitia resonate through their own organisation's values, practices and interactions with their whanau. They acknowledge that as a Māori organisation they have an active role to play in supporting Māori students to succeed in education, in order to become successful contributors to their whanau, hapu, iwi and society, especially in a high-need area such as Mangere.

They believe through their exploration of pedagogical models which may be appropriate for their kura, they have come across the work of Steiner schools in New Zealand and the pedagogical impulse of Steiner education worldwide. They consider the weaving together of the two elements

of Tikanga Māori and Steiner is both unique and innovative and very likely to deliver superior results.

4.2.1 Priority Leaner Groups:

Māori	80%
Pasifika	15%
Low socio economic	100%
Special Education	5%

4.2.2 Educational Track Record of the Sponsor

Until the end of last year MUMA has been a provider of He Ara Tika mentoring services within five South Auckland secondary schools. For over ten years, services have been provided by MUMA under contract to the Ministry of Education. In an effort to achieve the greatest impact through this programme, they employed a programme co-ordinator with teaching qualifications. This has ensured that the MUMA programme has a robust approach to achieving learning outcomes that support students' NCEA attainments. It was through the observations of this programme that MUMA developed a strong focus on offering a quality alternative to the existing education options.

They have had involvement with tertiary training through a related entity, MUMA Driving School.

Te Wanganga O Aotearoa (TWOA) trades training operating at the marae is now in its third year with the marae providing the area for TWOA students to build three relocatable three bedroom houses.

Through targeted social services programmes MUMA offers support to 50 single Māori mothers. The programme is achieving significant outcomes for the young mothers which has highlighted the extent of non-engagement with Early Childhood Education.

MUMA has an active application for a Targeted Assistance Programme for Early Childhood Education facility in Mangere South. This partnership application is designed to couple into the ECE facility, if successful.

4.3 Due Diligence: Review of Applicant Organisation

Section	Subsection	RAG	Comment
Organisational profile	Overall	Green	Registered Charitable Trust
	Year established		1985
	No of Staff		55
	No of Locations		1
Company Overview	Overall	Green	Contracts with MoE, MSD, MoJ, MoH, Te Puni Kōkiri, Department of Corrections.
Commitments	Overall	Green	He Ara Tika mentoring services involving five Auckland Secondary Schools, Whānau Ora provider within the NUMA collective. There is an active application for a Targeted Assistance programme for ECE facility.
Probity	Overall	Green	Nothing of concern noted.
Nominated Partners	Overall	Green	MUMA Kura Hourua Ltd (proposed charitable company to run the school).
Financial Summary	Overall	Green	No concerns to note
	Accounts provided		Yes – compliant response

Quality Assurance	Overall	Amber	Strategic Relationship with NZQA*
Health and Safety	Overall	Amber	Will be developed*
	Written EHS Policy		Will be developed*
	Formal EHS training		Will be developed*
	Emergency Procedures plans		Will be developed*
Referees	Overall	Green	Te Puni Kokiri; Carol Scholes , Rudolf Steiner Schools Trust; Department of Corrections, Grace Smit
	No of Referees provided		3

*Will form part of the contract negotiation if successful

4.4 Analysis of Application

Strengths	<p>Good justification evidenced for adopting the Steiner approach (linked to Māori worldwide).</p> <p>Aspirational and highly-focused on achieving positive outcomes for Māori.</p> <p>Specific and measurable hard performance targets are presented.</p> <p>Goals of effective Steiner/Kaupapa Māori school.</p> <p>Thorough treatment of this section. The philosophy, subject material and approach to teaching and learning is clearly explained, though sometimes strayed into high-level statements with limited evidence presented to support material. Cultural material is strong. Enrolment targets and community partnerships are strong.</p> <p>This is a mature organisation with significant experience and success in range of fields that has infrastructure support.</p> <p>The business plan is acceptable to very good and as with other applications, there are a number of areas that require further development.</p> <p>Governance generally is well presented but lacks detail around the viability of the other organisations.</p> <p>They have identified the need for ensuring a strong teacher/parent/whanau voice.</p> <p>They have identified in their finance plans trade training to assist with construction of the partnership school.</p> <p>The enrolment targets and community partnerships are strong, demonstrating how the school will attract students. Recruitment practices strong.</p>
Weaknesses	<p>Demographic evidence presented, but does not clearly support an argument for a school in this area. Student achievement data could have been given more explanation/conclusions drawn from it, but illustrates a need for a provision to serve Māori/Pasifika in the area.</p> <p>Evidence not used to make a compelling case for improved outcomes for priority students. Aligned with Ka Hikitia, but many elements not explained e.g. listed a range of assessment tools but have not provided any explanation of how these would be used and why.</p>

	<p>Descriptive response - the use of the three philosophies - Ka Hikitia, Steiner and integrated teaching will support learning.</p> <p>Track record in commercial acumen cited but not quantified. Some educational experience through PTE courses, community education and ECE. Student achievement record not presented, but group clearly working with target students/community.</p> <p>Business Plan</p> <p>The governance structure sets out some useful information on roles/responsibilities though the model is not justified in context of the schools vision although there is provision for Māori and Steiner representation. Key information around accountability between various Limited Liability Companies is missing though referenced.</p> <p>Operations Plan</p> <p>Unable to locate a number of the policies reference within their Application.</p>
Ministry Assessment	<p>Section 1: Mission and Vision</p> <p><i>a) Rationale:</i></p> <p>The rationale for the proposed school is to provide a unique bilingual option for students by incorporating Te Ao Māori with the Steiner educational approach. The rationale for the school is clear and generally well-supported by evidential data, but did not provide evidence that demonstrates that the school would improve outcomes for priority students.</p> <p><i>b) Focus on Priority Students</i></p> <p>The school is clearly focused on meeting the needs of Māori in Māngere and supports Māori achieving as Māori. The sponsor organisation is an active member of the Māori community and provides a range of community and educational services to priority learners.</p> <p><i>c) Sponsor's track record</i></p> <p>The Sponsor has an extensive track record in delivering community services to priority groups in South Auckland. The organisation is active in the community and holds a range of contracts with the government and other agencies. However, they have not fully articulated their experience in the field of education, and further information would benefit the application.</p> <p>Section 2: Educational Plan</p> <p><i>a) Curriculum and teaching</i></p> <p>The proposed curriculum is the New Zealand Curriculum, supplemented with the concepts from Te Marautanga o Aotearoa and the Steiner educational approach. Students will have access to high-quality te reo Māori learning in everyday subject learning, rather than treating it as a discrete subject. Kaupapa Māori will be woven throughout the curriculum and there will be special emphasis on developing and maintaining wairua (spiritual wellbeing). Generally strong curriculum, teaching and assessment plans were included in the application.</p> <p><i>b) Support for priority learners</i></p> <p>The application provides good plans for supporting Māori within the school environment, but is less clear on how Pasifika and students with special educational</p>

needs would be catered for, although the school is not specifically targeting these priority groups.

c) Partnerships

The sponsoring organisation is an active member of the community and provides a range of services to students and families, and has access to a wide range of community partners that would be likely to add value to the learning experience. A formal relationship with the Steiner Federation is sought to provide support and professional development for teachers.

Section 3: Business Plan

a) Governance

Organisational charts showing the role of the sponsor and governance/management are provided, and some information about accountabilities and roles and responsibilities is included. The governance structure is reflective of the principles of the mission and vision, with representatives for kaupapa Māori and Steiner pedagogy included on the governance board.

b) Finance

A full financial response was included in the application, with each section completed to a generally high standard. However, more detail around the assumptions underpinning the proposed costs would have benefitted this section.

The response accurately estimated the available government funding over each year of operation. [REDACTED]

s 9(2)(b)(ii) OIA

The response proposes the employment of eight registered teachers and six teacher aides to cater for 155 students at maximum roll. The student-teacher ratio averages 19.4:1 at maximum roll.

Overall, the Ministry considers the proposed budget acceptable once the school reaches its maximum roll, with direct learning costs at approximately 53% and property costs at 6%. Overheads are reasonably high at 41% of total costs in 2018; however this is explained with a number of the property managements costs covered through a contribution to the sponsor organisations overheads.

c) Premises

The school is proposed to be located at the Ngā Whare Waatea marae in Māngere. The sponsor plans on constructing new buildings, which it will own upon completion. The sponsor plans on partnering with Te Wānanga o Aotearoa's trades training programme to assist in constructing the school, but it is unclear what support will be provided. Additional funding would be sought, and if not available, the trust intends on securing a bank loan to cover building costs.

Section 4: Operational Plan

a) Enrolment

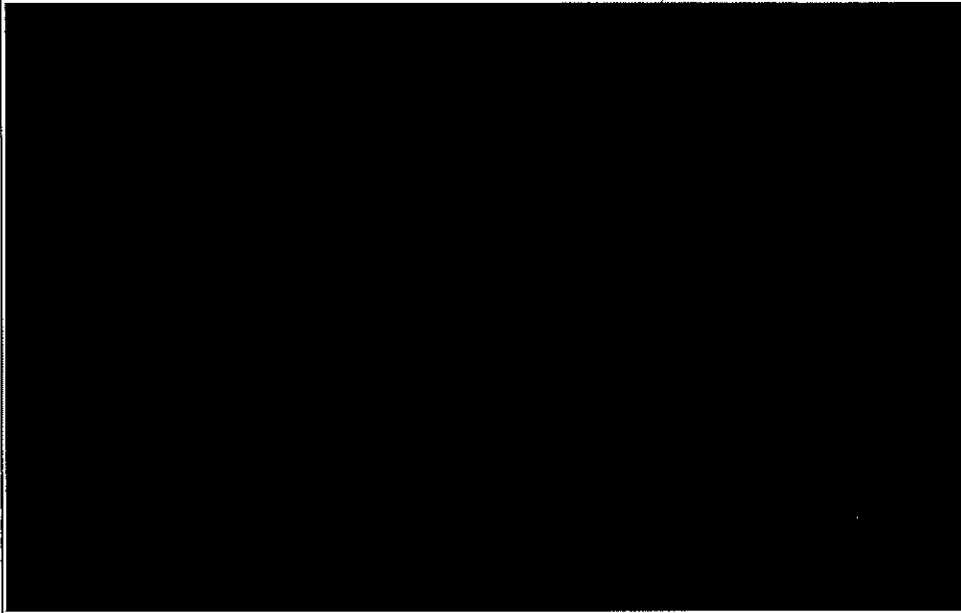
The proposed enrolment policy is stated as being open enrolment on a first-come, first-served basis, which is consistent with the enrolment policy for Partnership Schools. However, it also mentions priority for in-zone students, which is not compliant. Further information about the proposed enrolment scheme is required.

b) Other operations

The operational plan was generally strong and demonstrated the organisational capacity and capability of the applicant. However, some answers to questions could not be located and some sections were not completed to a high standard, which detracted from an otherwise strong section.

Overall Comment:

This was a strong application from a mature provider of social services. The proposal is differentiated from other provision in the area, and educational plans were generally thorough. The applicant has standing in the community and has the potential to be a strong sponsor. However, some concerns remain around the relationship between the sponsor and the Steiner Federation, and the difficulties in recruiting staff with a suitable level of experience in both Māori and Steiner education. The Ministry believes the applicant should be invited to interview to interrogate the proposal in more detail. s 9(2)(g)(i) OIA



5 Ngā Kākano o te Kaihanga Kura

5.1 Overview

Applicant	Nga Kakano o te Kaihanga Trust
School name	Nga Kakano o te Kaihanga Kura Hourua
Vision/Mission	Māori Excelling as Māori. For all students to reach their full God given potential, allowing them to excel and be successful as Māori; knowing who they are and where they belong.
Target students	Māori students
Location	Waitakere
Number of students (max)	240
Special character	Faith Based - Christian
Curriculum	Accelerated Christian Education (ACE) for English , Maths and Science and year 4-8 classes New Zealand Curriculum for other subjects /year groups offered by the school
Key Persons	Arohanui Vause , Te Rangi Allen, Veronica Allen, Geoffrey Matthews
Year level	Y1-13+ Opening with Y1-13+ from start-up

5.2 Summary of Ngā Kākano proposal

Nga Kakano Trust specialises in delivering targeted and responsive education, delivering high achievement results for its priority target students. The Trust was established in 1997, 17 Years ago.

Their objectives are to:

- Nurture and educate students in the ways of God within a bilingual and bicultural environment with Jesus Christ as the chief cornerstone.
- Deliver all educational programmes and instruction through the medium of both Māori and English, and to provide a curriculum that caters for all developmental stages from birth to school age.
- Provide a supportive and caring environment in which education can take place, and where parental involvement is encouraged, within the context of the established kaupapa.
- Affirm all students' self-respect, self-esteem, and self-worth within the supportive environment that promotes belief in Christian values.
- Provide sustenance and the means for obtaining sustenance, to people involved with the organisation.
- Express and promote Māori Christian philosophy based on Te Paipera Tapu (the Bible).
- Promote multicultural relations with those from the whānau and wider community to become an integral part of the community.
- Develop networks with other organisations to promote and enhance whānau and lifestyle in a positive manner

Nga Kakano will have a roll of 110 students, all of which will be of Māori decent. They propose that their school will operate from 22-24 Waipareira Ave, Henderson. The Trust will engage with the Ministry of Education for permanent occupancy of the premise through long-term lease, to outright purchase.

Their school will operate Year 1-13+, classes will be taught in English, Mathematics, Science, the Arts, Health, Physical Education, Social Sciences and Technology. The Accelerated Christian