

# Partnership Schools | Kura Hourua

## Quarterly Report



Year:

Quarter:

### School Details

School:

Type:

Current Year Levels: Year  to Year  Max. Roll:  Guaranteed Min. Roll:

School Physical Address:

School Postal Address:

School Website:

#### School Term Dates

	Start	End
Term 1:	2/02/2016	15/04/2016
Term 2:	2/05/2016	8/07/2016
Term 3:	25/07/2016	23/09/2016
Term 4:	10/10/2016	16/12/2016

### Contact Details

#### School Leader/Person Responsible For Teaching And Learning:

Name:  Position:

Landline:  Mobile:  Email:

#### Sponsor:

Name:

Key Contact:  Position:

Landline:  Mobile:  Email:

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### Organisational Structure And Teaching Positions

Is there any change to your organisational structure for this quarter e.g. arrival/departure of key trustees or change in management/governance functions of the School leadership?

No

Please provide commentary below if your organisational structure has changed.

Please enter in the table below the number of Teaching positions in relation to the current quarter.

	Contracted	Quarter 1	Quarter 2	Quarter 3	Quarter 4
Registered:	4.0	4.0	5.0		

Limited Authority To Teach:	0	0	0		
<b>Subtotal Registered/LAT (Minimum):</b>	<b>4.0</b>	4.0	5.0	0	0
Non Registered (Maximum):	1.0	2.0	1.0		
<b>Total:</b>	<b>5.0</b>	6.0	6.0	0	0

Please provide commentary below in relation to any variation from the contracted requirements listed above.

### Enrolment Details - Primary (Years 1 to 6)

	Quarter 1	Quarter 2	Quarter 3	Quarter 4
<b>Estimated Roll:</b>			80	80
<b>Actual Roll:</b>	69	76		
<b>Guaranteed Minimum Roll:</b>	80	80	80	80
<b>Maximum Roll:</b>	200	200	200	200

Please provide commentary below if your current roll is *not* between the Guaranteed Minimum Roll and the Maximum Roll specified in the Agreement.

We expect the roll to be above GMR by next quarter report.

### Student Engagement - Primary (Years 1 to 6)

	Annual Performance Standard	Quarter 1	Quarter 2	Quarter 3	Quarter 4	Year To Date	Annual Limit
<b>Unjustified Absences:</b>	0.01 x Number Of Students x Days In School Year	311	37			348	149
<b>Stand Downs:</b>	Zero Stand Downs	0	2			2	0
<b>Suspensions:</b>	Zero Suspensions	0	0			0	0
<b>Exclusions: (Under the age of 16)</b>	Zero Exclusions	0	0			0	0

Please record your comments in relation to any Performance Standards that have not been met below.

Unjustified absences have improved and are tracking within limit for the quarter. The first quarter unjustified absences are an anomaly arising from our enrolment process for new students at the start of year. We are confident that we can avoid this occurring next year. A year one boy was stood down for two days for hitting and injuring another child. Also a year two girl was stood down for one day for vandalising the classroom. These Stand Downs were recorded in the Assembly SMS by our administration user that has insufficient authority to update the ENROL file. We have changed our process of entering Stand Downs to Assembly SMS to ensure that it is captured within the ENROL file in future.



Schedule 6 of the Agreement requires you to run the Wellbeing School Survey annually. Please advise whether the Survey has been run in this calendar year, and if not, when it is next scheduled to be run.

*Note that the Wellbeing Survey is only available for students in Years 5 and above. If all your students are below Year 5, write "Not Applicable" below).*

**Last Completed:**

(DD/MM/YYYY)

Not Applicable

**Next Scheduled:**

(DD/MM/YYYY)

19/09/2016

## Targeting Priority Learners

Please complete the table below on Priority Learners in relation to the current quarter. Note that a student can only be counted in one category even if they identify with more than one priority learner group. When you are finished, the Total Headcount figure on the right should roughly balance with the Current Roll figure on the left.

**Māori and Pasifika:** This information would have been collected on the enrolment form for each student enrolled at your school. The information is also in ENROL. Therefore if a student is shown as Māori or Pasifika in ENROL, even if they are shown as having other ethnicities they can count towards the target (but only once).

**Students with Special Education needs:** As per your Agreement (Part 7:General, section 35), Special Education needs means students in the 'Ongoing Resource Scheme (ORS)', the 'Intensive Wrap Around Service' and 'High Needs Learning Service' provided through 'Resource Teachers Learning and Behaviour'.

**Students from low socio-economic backgrounds:** If the student has attended another state school in the previous three years, and if that school is decile 1-3, then the student can count as from a low socioeconomic background (this is restricted to three years because families may move as their circumstances change) OR identify the closest state school that is not a school of choice (integrated/section 155/156 school) to a student's address as listed on their enrolment form. If this school is a decile 1-3 school, the student can be counted as coming from a low-socio-economic background.

Percentage of Students meeting the  
Priority Learner definition:

Target:	Quarter 1	Quarter 2	Quarter 3	Quarter 4
75%	100.0%	100.0%		

Please provide some commentary on your quarterly result below if it is outside the target range. (You may also choose to comment even if you have met the target range).

## School Curriculum

Have there been any changes to the Learning Areas agreed to in Schedule 2 (Curriculum & Qualifications) of the Agreement?

No

Please provide commentary below if there have been changes.



## Financial Performance

### Operating Surplus (Target Range of 2% to 5%)

Surplus is where the total income is greater than total expenditure in the Statement of Comprehensive income and expenditure statement. Deficit is where the total income is less than total expenditure in the Statement of Comprehensive income and expenditure statement.

	Quarter 1	Quarter 2	Quarter 3	Quarter 4
Income:	\$187,987	\$383,329		
Expenditure:	\$180,502	\$371,325		
Operating Surplus (%):	4.0%	3.1%		

Please provide some commentary on your quarterly result below if it is outside the target range. (You may also choose to comment even if you have *met* the target range).

Please note: Quarter 2 figures are Year-to-date.

### Working Capital Ratio (Target Ratio of at least 2:1)

The working Capital ratio shows whether a school has enough short term assets i.e. money in the bank and other current assets to cover its short term debt (e.g. what it owes currently i.e. GST, creditors etc.) In the Balance sheet the figure is derived from dividing total current assets by total current liabilities.

	Quarter 1	Quarter 2	Quarter 3	Quarter 4
Current Assets:	\$38,227	\$74,547		
Current Liabilities:	\$42,508	\$92,778		
Ratio:	0.90	0.80		

Please provide some commentary on your quarterly result below if it is outside the target range. (You may also choose to comment even if you have *met* the target range).

The Sponsor continues to provide funding support to enable the Kura to manage its cash flows. The goals for achieving financial sustainability are 1. to trade profitably and 2. to raise the Kura roll above 100 students (forecast for 2017).

### Debt Equity Ratio (Target Ratio of 0.5 to 1)

A debt ratio is used to measure an entity's financial leverage, calculated by dividing total liabilities by equity. The D/E ratio indicates how much debt a company is using to finance its assets relative to the amount of value represented in equity. A number lower than 1 indicates that the entity has taken on manageable debt levels and has a low risk, and the lower the number the less risk the entity is exposed to.

	Quarter 1	Quarter 2	Quarter 3	Quarter 4
Equity:	\$57,835	\$62,256		

Total Liabilities:

\$42,508	\$92,773		
Ratio: 0.73	1.49		

Please provide some commentary on your quarterly result below if it is outside the target range.

(You may also choose to comment even if you have *met* the target range).

The Sponsor continues to provide funding support to enable the Kura to manage its cash flows. The goals for achieving financial sustainability are 1. to trade profitably and 2. to raise the Kura roll above 100 students (forecast for 2017).

### Operating Cash (Forecast vs. Actual)

*This is the annual earnings before depreciation, and excluding capital spending.*

	Quarter 1	Quarter 2	Quarter 3	Quarter 4
Operating Cash per Forecast:	\$20,000	\$30,000		
Operating Cash End of Quarter:	\$17,370	\$55,050		
Variance from Forecast:	-13%	84%		

Please provide some commentary on your quarterly result below if variance is more than 10%.

(You may also choose to comment even if you have *met* the target range).

The Kura's cash position is improving. The Sponsor continues to provide funding support to assist the Kura with managing its cash flows. The goals for achieving financial sustainability are 1. to trade profitably and 2. to raise the Kura roll above 100 students (forecast for 2017).

### Debt Service Coverage Ratio

Do you service any interest, principal or lease payments?

Yes

*Debt Service Coverage is the ratio of cash available for debt servicing to interest, principal and lease payments.*

	Quarter 1	Quarter 2	Quarter 3	Quarter 4
Debt Service Coverage Ratio (%):				

Has the Sponsor defaulted on any of its debt obligations, or can the Sponsor reasonably anticipate that it may soon default on any of its debt obligations?

No

Please provide commentary below if the answer to the above question was Yes.

Te Whare Wananga o MUMA Ltd has purchased a bus and van which provides transport for the ECC and Kura. The company services these hire purchases from trading surpluses. The hire purchase agreements are up to date.



## **Operational Management**

### **Parents, family, whānau, iwi and community engagement policy**

**Have you have published and complied with your parents, family, whānau, iwi and community engagement policy in accordance with Section 10.6 of the Agreement?**

Yes

If you have not published or complied with this policy, please provide commentary below.

### **Policies for ensuring a safe physical and emotional environment for Students**

**Have you complied with your policies for ensuring a safe physical and emotional environment for students in accordance with Section 7.5 of the Agreement?**

Yes

If you have not complied with these policies, please provide commentary below.

### **Official complaints received by the Sponsor**

**Have you received any written official complaints?**

No

Please briefly detail any complaints below. This summary should describe each complaint in general terms, without mentioning specific names or information that may be deemed confidential, and should describe how each complaint has been resolved.

### **Challenges received under the Independent Review Framework (IRF)**

**Have students or parents, families and/or whānau of students have sought to use the Independent Review Process (IRP) to challenge any decisions, actions or omissions of the Partnership School?**

No

Please briefly detail any complaints below. This summary should describe each challenge in general terms, without mentioning specific names or information that may be deemed confidential, and should describe how each challenge has been resolved under the IRP.

## Contractual Requirements

Please confirm you have met the following contractual requirements from Part 2, Part 3, and Part 7 of the Agreement for the current quarter.

### Part 2 of the Agreement: Key Requirements

Clause:	Quarter 1	Quarter 2	Quarter 3	Quarter 4
6(b): The Sponsor may only provide religious instruction in the School during School hours if Schedule 1 provides that the Sponsor is permitted to provide religious instruction to the Students.	Met	Met	Met	Met
7.5: The Sponsor has complied with the policies for ensuring a safe physical and emotional environment as per the approved operative document.	Met	Met	Met	Met
9.1(a): The Sponsor will ensure that it teaches its Students in accordance with the Curriculum described in Schedule 2.	Met	Met	Met	Met
9.1(b): Notwithstanding any description of the Curriculum in Schedule 2, the Sponsor must ensure that the Curriculum is, at a minimum, in line with any Foundation Curriculum Policy Statement.	Met	Met	Met	Met
10.1(c): The Sponsor is responsible for every Student who is attending a Learning Experience Outside the Classroom and must comply with any Ministry guidelines or Education Circular that relates to a Learning Experience Outside the Classroom that the Minister may determine and inform the Sponsor shall apply to the Sponsor as a Partnership School/Kura Hourua.	Met	Met	Met	Met
12.1(b): The Sponsor must notify the Ministry who has been appointed to the role of chief executive and must update the Ministry as soon as possible following a change in the person appointed to this role.	Met	Met	Met	Met
14.1(e): The Sponsor must notify the Minister and obtain the Minister's approval before using premises other than the Premises described in Schedule 5 for the regular delivery of Courses to Students. The Sponsor may only seek the Minister's approval to use alternative premises under this paragraph (e) if either of the following circumstances apply: (i) the new premises are in addition to the Premises described in Schedule 5; or (ii) the new premises are to replace the Premises described in Schedule 5	Met	Met	Met	Met
14.2: The Sponsor will ensure that it has, at all times, the equipment that is suitable for the Curriculum being delivered or to be delivered at the School, the Class Level(s) and abilities of its Students.	Met	Met	Met	Met

If any of the above have been recorded as 'Not Met' in the most recent quarter, please record the clause number, reason and remedy or mitigation for this below.

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### Part 3 of the Agreement: Minimum Requirements and Performance Regime

Clause:	Quarter 1	Quarter 2	Quarter 3	Quarter 4
16.1(a): No serious incident occurs in relation to the School that compromises the health and safety of a Student that could reasonably have been prevented by the Sponsor.	Met	Met		
16.1(b): No serious criminal activity is discovered to have taken place on the Premises.	Met	Met		
16.1(c): The Sponsor has operated the School in accordance with the requirements set out in the Gazette Notice.	Met	Met		
16.1(d): The Sponsor has not exceeded the Maximum Roll.	Met	Met		
16.1(e): The Sponsor has accepted students in accordance with clauses 7.2 to 7.4 of the Agreement.	Met	Met		
16.1(f): The School hours and term dates have not reduced below the minimum levels set out in Schedule 1 of the Agreement.	Met	Met		
16.1(g): The stand-down or suspension periods for Students have not exceeded the maximum periods set out in the Act.	Met	Met		
16.1(h): The Sponsor has complied with the legislative requirements in relation to standing down, suspending, excluding or expelling.	Met	Met		
16.1(i): The Sponsor has complied with every direction given under the Act or the Agreement.	Met	Met		
16.1(j): Any transport required is provided as described in Schedule 3 of the Agreement.	Met	Met		
16.1(k): The Sponsor has a person appointed as the person responsible for teaching and learning at all times with a proven background in educational leadership.	Met	Met		
16.1(l): The number or percentage of Teaching Positions filled by people holding a Practising Certificate or Limited Authority to Teach did not fall below the minimum number or percentage set out in clause 2 of Schedule 4 of the Agreement.	Met	Met		
16.1(m): The percentage of the Curriculum time taught by people holding a Practising Certificate or Limited Authority to Teach as compared with the total Curriculum time taught by any person holding a Teaching Position did not fall below the minimum percentage set out in clause 3 Schedule 4 of the Agreement.	Met	Met		
16.1(n): The Sponsor has complied with all requirements in relation to Police vetting under clauses 78C to 78CD of the Act (as applied by section 158U of the Act) and reporting on Police vetting under the Agreement.	Met	Met		
16.1(o): The Sponsor has reported to the Minister in accordance with clause 18.2 of the Agreement.	Met	Met		
16.1(p): The Sponsor has reported to the Ministry in accordance with clause 18.3 of the Agreement.	Met	Met		
16.1(q): The Sponsor has reported to parents in accordance with clause 7.8 of the Agreement.	Met	Met		
16.1(r): The Sponsor has reported to the public in accordance with clause 18.4 of the Agreement.	Met	Met		
16.1(s): The Sponsor has provided audited accounts as required by clause 18.5 of the Agreement	Met	Met		
16.1(t): The Sponsor has provides all of the required reports to the Minister by the dates or within the timeframes set out in clause 18.2 of the Agreement.	Met	Met		



18.1 (a) and (b): In addition to the requirements for enrolment records set out in Section 77A of the Act, the Sponsor must: (i) use a student management system that is approved by the Minister for use by the Sponsor which the Minister notifies the Sponsor of in writing; and (ii) use electronic attendance files for gathering data on Student attendance at School.	Met	Met		
18.1 (c): The Sponsor must maintain detailed records in accordance with prudent business practice and sufficient to enable the Sponsor to complete its reporting obligations under this Agreement, the Act or any other applicable laws	Met	Met		

If any of the above have been recorded as 'Not Met' in the most recent quarter, please record the clause number, reason and remedy or mitigation for this below.

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### Part 7 of the Agreement: General Requirements

Clause:	Quarter 1	Quarter 2	Quarter 3	Quarter 4
32.1: The Sponsor may only provide religious instruction in the School during School hours if Schedule 1 provides that the Sponsor is permitted to provide religious instruction to the Students.	Met	Met		
33: The Sponsor will be required to maintain all necessary insurances needed for the ongoing operation of the School in accordance with this Agreement and any applicable laws. This shall include, at a minimum, holding the types of insurance at the levels specified in Schedule 9.	Met	Met		
34.4(a): The Sponsor must not sub-contract any obligations under this Agreement without the written consent of the Minister. If written consent is provided by the Minister, the Sponsor will remain fully responsible for the performance of all obligations under this Agreement (and responsible and liable for any non-performance) and will be responsible for all acts, defaults and neglects of any sub-contractor.	Met	Met		
34.5(a): The Sponsor may not assign or transfer any of its rights or obligations under this Agreement without the written consent of the Minister.	Met	Met		

If any of the above have been recorded as 'Not Met' in the most recent quarter, please record the clause number, reason and remedy or mitigation for this below.

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**To complete the report, please also fill in the National Standards tab.**





**Reading: Mid-Year Teacher Judgement of progress towards National Standards**

**Reading: Mid-year teacher judgment by Class Level.**

Class Level:	Well Below	Below	At	Above	Total
After 40 Weeks	0	13	0	0	13
After 80 Weeks	1	2	11	1	15
End of Year 3	3	2	4	5	14
End of Year 4	0	6	1	4	11
End of Year 5	0	2	5	5	12
End of Year 6					
End of Year 7					
End of Year 8					
<b>Total:</b>	<b>4</b>	<b>25</b>	<b>21</b>	<b>15</b>	<b>65</b>

**Reading: Mid-year teacher judgment by Ethnicity.**

Ethnicity:	Well Below	Below	At	Above	Total
Māori	4	24	20	14	62
Pasifika	0	1	1	1	3
Other Ethnicities	0	0	0	0	
<b>Total:</b>	<b>4</b>	<b>25</b>	<b>21</b>	<b>15</b>	<b>65</b>

**Reading: Mid-year teacher judgment by Gender.**

Gender:	Well Below	Below	At	Above	Total
Male	3	13	12	5	33
Female	1	12	9	10	32
<b>Total:</b>	<b>4</b>	<b>25</b>	<b>21</b>	<b>15</b>	<b>65</b>

**Writing: Mid-Year Teacher Judgement of progress towards National Standards**

**Writing: Mid-year teacher judgment by Class Level.**

Class Level:	Well Below	Below	At	Above	Total
After 40 Weeks	0	9	4	0	13
After 80 Weeks	0	1	13	1	15



End of Year 3	1	4	5	4	14
End of Year 4	0	0	7	4	11
End of Year 5	0	0	3	9	12
End of Year 6					
End of Year 7					
End of Year 8					
<b>Total:</b>	<b>1</b>	<b>14</b>	<b>32</b>	<b>18</b>	<b>65</b>

**Writing: Mid-year teacher judgment by Ethnicity.**

Ethnicity:	Well Below	Below	At	Above	Total
Māori	1	13	31	17	62
Pasifika	0	1	1	1	3
Other Ethnicities	0	0	0	0	
<b>Total:</b>	<b>1</b>	<b>14</b>	<b>32</b>	<b>18</b>	<b>65</b>

**Writing: Mid-year teacher judgment by Gender.**

Gender:	Well Below	Below	At	Above	Total
Male	1	11	14	7	33
Female	0	3	18	11	32
<b>Total:</b>	<b>1</b>	<b>14</b>	<b>32</b>	<b>18</b>	<b>65</b>

**Maths: Mid-Year Teacher Judgement of progress towards National Standards**

**Maths: Mid-year teacher judgment by Class Level.**

Class Level:	Well Below	Below	At	Above	Total
After 40 Weeks	0	6	7	0	13
After 80 Weeks	1	2	11	1	15
End of Year 3	1	4	5	4	14
End of Year 4	0	5	5	1	11
End of Year 5	0	3	5	4	12
End of Year 6					
End of Year 7					
End of Year 8					
<b>Total:</b>	<b>2</b>	<b>20</b>	<b>33</b>	<b>10</b>	<b>65</b>

**Maths: Mid-year teacher judgment by Ethnicity.**

Ethnicity:	Well Below	Below	At	Above	Total
Māori	2	19	32	9	62



<b>Pasifika</b>	0	1	1	1	<b>3</b>
<b>Other Ethnicities</b>	0	0	0	0	
<b>Total:</b>	<b>2</b>	<b>20</b>	<b>33</b>	<b>10</b>	<b>65</b>

**Maths: Mid-year teacher judgment by Gender.**

<b>Gender:</b>	<b>Well Below</b>	<b>Below</b>	<b>At</b>	<b>Above</b>	<b>Total</b>
<b>Male</b>	1	11	18	3	<b>33</b>
<b>Female</b>	1	9	15	7	<b>32</b>
<b>Total:</b>	<b>2</b>	<b>20</b>	<b>33</b>	<b>10</b>	<b>65</b>