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# **Request for Application to operate a Partnership School | Kura Hourua opening in 2015.**

## **Part Two - Application Form**

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Submitted By:

Upper Valley Education Trust

For the Upper Valley Middle School

ISSUE DATE            19 December 2013

CLOSE DATE           11 March 2014 12:00 pm

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# Introduction

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This document is the form of response to the Request for Application to operate a Partnership School | Kura Hourua (Partnership Kura) opening in 2015. Please follow the overarching instructions set out in Part One – Requirements and Rules.

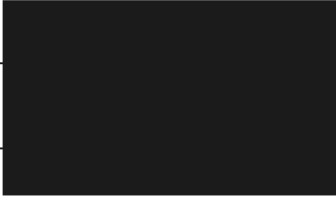
**NOTE:**

Your Application must not exceed 100 pages. This includes supporting attachments, but excludes the following sections:

- Cover page
- Table of content
- Notice of Intent to respond
- Applicant contact details
- Assumptions, risks and caveats
- Applicant organisation overview
- Applicant declaration
- Applicant checklist.

# 1 Applicant Contact Details

## i. Contact person for this Application

Contact person:	Ruth Harland						
Position:	Chairman						
Phone number:							
Mobile number:					s 9(2)(a) OIA		
Email address:							
Is the contact person authorised to negotiate?	Yes	<input checked="" type="checkbox"/>	No	<input type="checkbox"/>			


## ii. Sponsor Organisation

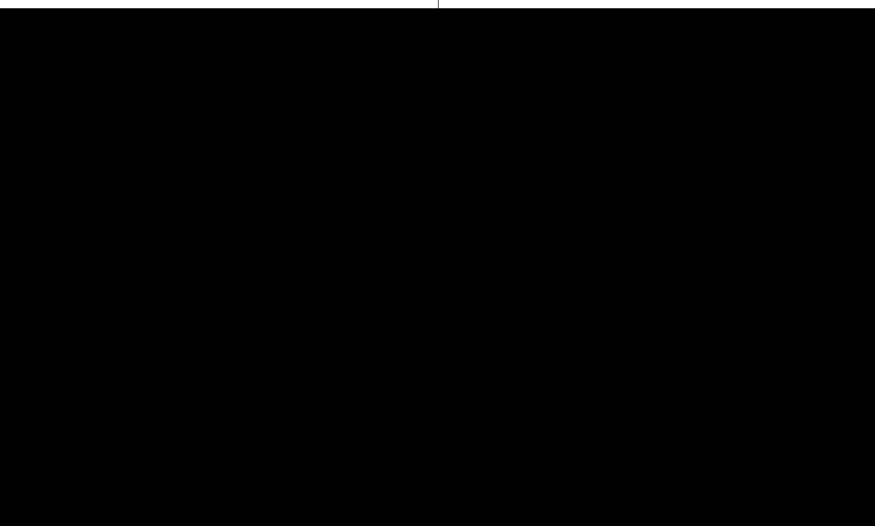
Complete the following table detailing the organisation that will, if successful, be named as the Sponsor of the school.

Full legal name:	Upper Valley Education Trust		
Trading name: (if different)	Upper Valley Middle School		
Name of parent organisation:	N/A		
Physical address:	16-22 Lane St, Upper Hutt		
Postal address:	PO Box 40-234 Upper Hutt 5140		
Website:	www.uppervalley.school.nz		
Location of head office:	Upper Hutt		
Type of entity (legal status):	Charitable trust		
Registered Charity	Yes		
Charity (or) Company registration #:	2556020		
Country of residence:	New Zealand		

**iii. Referees**

Please supply the details of three referees. Referees provided should be able to attest to your organisation's capability in the areas of education, business and community engagement. Please do not provide employees of the Ministry of Education as referees.


<b>Referee #1</b>	
Name of organisation:	s 9(2)(a) OIA
Name of referee:	
Telephone:	
Email:	
Relationship:	
When:	2009 -


<b>Referee #2</b>	
Name of organisation:	s 9(2)(a) OIA
Name of referee:	
Telephone:	
Email:	
Relationship:	

PART 2 - APPLICATION FORM

APPLICANT NAME: [UPPER VALLEY EDUCATION TRUST]

s 9(2)(a) OIA

	
When:	2013-

<b>Referee #3</b>	
Name of organisation:	s 9(2)(a) OIA
Name of referee:	
Telephone:	
Email:	
Relationship:	
When:	2009-

## 2 Applicant Profile

### Applicant Organisation

- a) **Do you intend to establish a new legal entity to run the school? (delete non applicable)**

**Response**

No

- b) **Will the Sponsor organisation run the school or subcontract some or all of the operation of the school to other parties (delete non applicable)?**

**Response**

Sponsor intends to run school

### iv. Overview of Applicant's organisation

Type of organisation:	Education Trust
Year established:	2012
History:	The Upper Valley Education Trust was established in order to provide education to year 7-10 students in Upper Hutt. The school opened in 2012 and is providing an outstanding education to the students currently enrolled. There is a desire for the school to be extended but development plans have stalled due to the financial circumstances of the community and the current need to charge fees for attendance.
Summary of experience relevant to your application to operate a Partnership Kura:	The school has been operational for 2 years and has robust governance and management systems in place. The Trust Board comprises experienced trustees able to provide the necessary leadership to the professional staff employed. It is supported and mentored by the Villa Education Trust which currently operates two other schools, in Auckland: Mt Hobson Middle School, established in 2003; South Auckland Middle School, established in 2014.  Both the Trustees and the current professional staff have strong links with the local community, which will be enhanced as a Partnership Kura.
Total number of staff in NZ:	1 fulltime 4 part time
Number of locations in NZ:	1
Overseas locations:	None

**v. Current business commitments**

Business activities:	Currently this Trust only operates Upper Valley Middle School and has no other major business commitments.  There are no known limitations or constraints on the organisation.
Other Contracts with government	No past contracts.

**vi. Probity**

List any pending claims against the organisation:	N/A
List any court judgments or other decisions that have been made against the organisation in the last 6 years:	N/A

**vii. Proposed Subcontractors**

Disclosure: Applicants must indicate and provide details below if they intend any person or organisation, who is not an employee, to sub-contract on any part of the application requirements.

<b>Sub-contractor #1</b>	
Sub-contractor name:	N/A
Address:	
Specialisation:	
Describe the deliverables the sub-contractor will be responsible for:	

**Sub-contractor #2**



PART 2 - APPLICATION FORM

APPLICANT NAME: [UPPER VALLEY EDUCATION TRUST]

Sub-contractor name:	N/A
Address:	
Specialisation:	
Describe the deliverables the sub-contractor will be responsible for:	

*Copy and add more Tables as required*

**viii. Financial Information**

Current financial status:	[REDACTED]			
Gross revenue:	state the gross revenue for the last two years [REDACTED] s 9(2)(b)(ii) OIA			
Net profit (surplus) and Net Assets:	state the net profit (or surplus) for the last two years and the total value of net assets as at the closing date of the last financial period. [REDACTED] s 9(2)(b)(ii) OIA			
Last audited financial accounts:	insert date of last audited financial accounts This is currently being finalised and will be provided on request.			
Copy of latest audited accounts attached?	Yes		No	✓
Copy of latest annual report attached?	Yes		No	✓
Is organisation in dispute with any trade union?	Yes		No	✓

### 3 School Overview

The School Overview section is a summary of the information set out in the body of your application, and should only be completed once your application is prepared. This is an unassessed section of the application, and is only used for information purposes by assessors.

#### i. School Location

Enter the address / location of your proposed Partnership Kura.	s 9(2)(b)(ii) OIA [REDACTED]
Do you propose to operate the school at more than one location?  If yes, provide the proposed locations for each of the sites.	No

#### ii. Year Groups

List the year groups that your school proposes to serve.

The Partnership Kura will cater for students from Years 7 - 10

#### iii. Priority Learner Groups

Enter the estimated number of students from each of the priority learner groups that will attend your school, when the roll is full. Ensure that the numbers used in this section are reflective of the demographic data you have set out in the body of your application.

The table below is an estimate of the number of students from the priority learner groups and those just outside these groups we also envisage applying. The numbers are based on our knowledge of the local community and our expectation that, through the work of our Community Liaison Manager, and local community leaders/workers, we will be able to attract, and retain, a high proportion of students from the priority learner groups.

In our view students outside these groups are currently better served by local schools than the priority learners. However, we recognise this is not always the case and some learners from low to middle income families will apply. Such families also lack the choices provided to those able to afford the fees and associated costs of integrated and independent schools.

Māori learners	Pasifika learners	Learners with special education needs	Other learners	TOTAL
45	30	12	21	108

#### iv. School Roll

If you propose to operate the school at more than one location, you must provide a table for each of the proposed locations and a summary table showing the total combined roll for the school. Please ensure that you have fully explained and justified your decisions around school roll and location in the body of your application.

**Note**

1. *A copy of this table is provided in the MS Excel workbook, with formulae that will calculate the % change and total each of the columns. Applicants may use this version and simply copy and paste the details from that table as a replacement to below.*
2. *Delete the rows for the year levels that do not apply to the proposed school.*

The school roll numbers in the table below are based on having two communities within one school: one with 12 students per class and the other with 15 students per class. While these two communities will operate in one location, we wish to retain the core culture of the Villa model and the concept of a family. We do not want to replicate the context of a larger intermediate school where roll and class sizes can mean less personalised attention and less awareness of the child as an individual.

The number of students reflects the size and nature of our facility and our anticipation of some classes being smaller because the students need more support.

The value of having a student at UVMS for one year is considerably less than that of two or more years of attendance so we expect the number of year 10s will be low in our first year. We aim for a full roll, with full staffing, as soon as possible and anticipate that target would be achieved within two years.

<b>Year</b>	<b>2015 Roll</b>	<b>2016 Roll</b>	<b>% Change</b>	<b>2017 Roll</b>	<b>% Change</b>	<b>2018 Roll</b>	<b>% Change</b>	<b>2019 Roll</b>	<b>% Change</b>
<b>7</b>	27	27	0	27	0	27	0	27	0
<b>8</b>	27	27	0	27	0	27	0	27	0
<b>9</b>	20	27	26%	27	0	27	0	27	0
<b>10</b>	10	20	50%	27	26%	27	0	27	0
<b>Total</b>	84	101	0	108	0	108	0	108	0

## 4 Executive Summary

1. Provide an executive summary of no more than 800 words that clearly sets out the distinctive mission of your proposed school, why you are planning on establishing it, what it will achieve, and how it will achieve it.

### Note

An initial evaluation of your application will be made on the basis of this summary. It is important that you be as specific as possible, and include the following;

- A compelling 1-2 sentence mission statement that sets out the purpose of your school;
- A coherent and concise description of what the school will look like in 5-10 years if it is achieving its mission;
- A coherent and concise summary of the school's performance goals and how they will be measured; and
- A clear description of the student population/priority goals the school will serve.

### Mission statement

As a Partnership Kura Upper Valley Middle School (UVMS) will focus on the challenging early adolescent stage (Years 7-10). Our mission is to ensure the development of young people as confident, independent learners reaching their academic, social and emotional potential. We aim to graduate into senior school (Years 11-13) young adults well equipped to achieve academically and to become good citizens, able to make a valuable contribution in their communities.

### In five – ten years

If UVMS is achieving this mission, and we are confident it will, then in five to ten years it will be the hub for a rich learning community, including learners, parents, family, whānau, and the local community. It will offer a rich, inclusive, and integrated curriculum, using innovative and holistic approaches to engage the whole school community. It will be unwaveringly focused on all learners achieving to their academic, social and emotional potential, confident in their cultural and individual identities. Local high schools will welcome our students at Year 11 knowing they bring the necessary tools and attitudes for success. There will be increasing numbers of young people and families in the area that have a sense of being part of their community, and who are making worthwhile contributions to society.

### Performance goals

Our performance goals are summarised under six headings:

- **Achievement.** Our achievement goals include academic, social and emotional goals. Central to the measurement of academic goals are individual projects and regular standardised testing. Emotional and social outcomes will be measured through a range of formal and informal measures including surveys, teacher observations and community feedback.
- **Attendance.** Our goal is that all learners are regularly attending school. This will be measured through normal attendance checks. Any concerns will be discussed with the families and every attempt made to find solutions to the underlying causes.
- **Participation by learners.** It is essential that all students are not only present at school but that they are fully engaged and participating in all activities, within the classroom and beyond. This goal will be measured through behavioural records, achievement data and evidence related to the levels of participation in a range of co-curricular activities.
- **Participation by parents, families and whānau.** It is important that parents, families and whānau are engaged in their children's learning and participate in the wider life of the school. The extent and nature of engagement and participation will be monitored through the way the community uses the services we will offer through our whānau space, records kept by the Community Liaison Manager, and feedback from the community

- **School culture.** UVMS is a safe and inclusive learning environment where learning is valued and where all members of the community feel welcome. An ethic of care is at the heart of our culture. It is the responsibility of all members of the UVMS community to ensure this culture is maintained and enriched. This goal will be measured through a range of informal and formal tools, including incident analysis and teacher judgement. We will also solicit and welcome feedback from the community in a range of ways.
- **Efficiency and efficacy of systems and processes.** Systems and processes currently in place include financial, property and resource management, staff employment and appraisal, health and safety and all record keeping. Responsibility for ensuring these are effectively implemented and monitored lies with the Office Manager, who reports to the Business Manager.

### **Student population**

Our Community Liaison Manager will work with primary schools, community centres/workers, special needs teachers, maraes and church groups, building on links we have already established, to identify students that will most benefit from UVMS. Currently many of these students can be found spread through low to mid decile schools across the northern Hutt Valley. These schools, and the traditional primary, intermediate, secondary educational pathway, do not always meet their specific needs. A number of priority learner parents express concern that their children often first lose their way after leaving primary school. While there are a number of integrated and independent schools in the area their fees place them beyond the reach of many of the priority learners. We would offer them a choice, another pathway.

The students we will specifically target are located in the northern Hutt Valley: in the areas of Timberlea, Brown Owl, Maoribank, Trentham, Stokes Valley, Pomare, Taita and Naenae. The wider community stretches for 20 kms: from Naenae to Birchville. This area has pockets of low-decile/low-income, high Māori and/or Pasifika populations. This is also where many of the families of Rimutaka Prison inmates live. Our aim is to attract several families from within a community who are from the target priority learner groups. In our experience many Māori and Pasifika students and families gain confidence from being with other families they know.

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## 5 PURPOSE AND GOALS

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2. Provide a statement of purpose and goals that:
  - a) sets out your distinctive mission and vision, including:
    - i) why you are proposing to open your school;
    - ii) what makes it unique and sets it apart from existing provision; and
    - iii) how it will enable improved student engagement and achievement;
  - b) defines the schools performance objectives and how these will be achieved and measured;
  - c) provides demographic evidence that demonstrates the need for a new school and/or new school places in your proposed location and
  - d) outlines the key advantages of your application, including the educational track record of the sponsoring organisation.

### Mission/Vision

Upper Valley Middle School (UVMS) was opened in 2012 by two families. These founding families firmly believed that local parents should have more choice regarding the educational pathways for young people in the Hutt Valley. In considering alternative, New Zealand options, the Villa Education Trust (VET) model, as developed in Mount Hobson Middle School (MHMS), was adopted. The vision, values and underlying beliefs of the VET mirrored those of the families involved in developing UVMS. Further, MHMS provided not only an educational model but also an operational one with sound management and governance practices in place.

The mission and vision of the founding families was much wider than has been achieved to date, with regard to the learners, their families, and whānau we are able to work with. A key desire of the Upper Valley Education Trust Board was to enable students from low socio-economic families to attend UVMS. To that end our fees were set as low as possible and we have actively sought hardship scholarships since opening. However, charging even our low fees has limited those who are able to attend, constraining the trustees in achieving their mission of providing for all learners in the Hutt Valley Community who are not well served by the more traditional primary/secondary pathway.

It is our belief that becoming a Partnership Kura will enable us to provide a rich and proven alternative pathway for learners and their families and whānau who would otherwise not have choices. It will enable us to work with the local community in a true partnership. At UVMS we can, we have and we do make a significant difference to the learning of many learners, who were not doing well in other settings. Our vision is to extend the opportunities afforded our current learners to those most in need in the community.

Our vision for Upper Valley Middle School, as a Partnership Kura, is no different to that which drove the initial formation of UVMS. We envisage a Kura where 11-14 year olds achieve to their best potential and leave with the skills, knowledge and attitudes necessary to not only succeed in their further education and the workplace but also to make a positive contribution in their communities. UVMS will offer families and their children a different pathway to success, an alternative to the current system, which has not always served them well. It will offer choice to those who do not always have it.

Our learners will be motivated to learn through the quality of content and instruction and will be well supported, in small classes, and through the focus on each individual, to develop the work ethic and personal disciplines required for success. These young people will also be supported, through the holistic and integrated curriculum, to develop the social and emotional maturity required to grow into resilient, innovative and community-focused young adults. They will understand education as integrated, with all subjects connected, and all learning connected to the real world. They will be inspired by the lives of role models in their communities as they also welcome the helpful actions of their colleagues and take pride in the contributions they make in school and in the Hutt.

At its simplest, our vision is that UVMS will be a rich and vibrant hub for learning and for growth; a place where the community meets and collaborates, focused on developing their youth as individuals secure in the knowledge of who they are and willing and able to take their place in society.

Our mission is to:

- provide a pathway of opportunity for outstanding academic, social and emotional achievement for Year 7 to Year 10 learners;
- play a significant part in preparing our learners for full and effective participation in their future academic, cultural, sporting, social and working lives;
- provide a learning environment that is rich, innovative and flexible;
- ensure our learners are confident in their individual and cultural identities, secure in the knowledge of who they are and where they belong;
- meet the needs of each learner through their individual education plans; and
- to make this type of education as accessible as possible to those who are currently not well served by our local schools

The core values of UVMS are:

- excellence in learning;
- collaboration and cooperation among students, families, whānau and the wider community;
- building of personal character through applied Christian values<sup>1</sup>; and
- a strong emphasis on thinking skills and learners understanding how they think and learn (meta-cognition).

We believe that UVMS is unique in the Hutt Valley and indeed in the greater Wellington region and beyond. While many schools adopt parts of our model (e.g. project work or community service) it is our view that none (beyond MHMS) have succeeded in successfully employing the holistic and integrated educational model that we offer. Our innovation is in the sum of the package we offer, not in the parts. Our espoused values and our values in practice are the same. We truly believe in what we do and how we do it. We strive always to improve, to listen to others and to reflect on the needs of our learners. We can do this because of the inherent flexibility in our model. Our learners succeed because we ensure they have every opportunity to do so and support them as individuals. Learning is reinforced and reframed; learners are encouraged to follow their own interests and their families and whānau are actively encouraged to participate.

In summary, our mission is to create a Partnership Kura to meet the very real need in this area (see below) for an alternative educational pathway and for choice for those unable to access the current alternatives. For the more wealthy there are a number of options beyond the current state system. All the integrated schools in the Hutt Valley, for example, are over-subscribed. However, for those who most need an alternative, many of whom are looking for one, the options are limited. Becoming a Partnership Kura would enable us to achieve our vision of a school particularly targeted at those for whom the current system is inadequate and/or limiting. We believe this will be attained through our innovative, holistic and integrated approach to teaching and learning, through our unwavering focus on the learner and their needs and through our commitment to working with the community. What sets us apart from other schools in the area is our culture, the way we do things, and our unerring faith in the ability of young people to learn and to succeed.

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<sup>1</sup> Direct religious education is not part of the Curriculum. Rather students are encouraged and supported to live by the core tenets of Christianity as they apply to ensuring a safe and inclusive environment.

## Performance Objectives

The following four overarching performance objectives expand on the performance goals summarised in the Executive Summary. These objectives are directly linked to the attainment of the overall vision of the Kura to ensure the academic, social and emotional achievement of all students.

In order to enable our students to achieve, each of the following goals will need to be attained. Having students at school, engaged and participating in all activities is vital to their success. Also vital is an engaged and supported wider community including parents, families and whānau. Finally, it is necessary that the school is effectively governed and managed to ensure its viability as an organisation and its long-term sustainability.

We will use our performance measures both to inform the Ministry of our progress and to inform our own self-assessment. The UMVS educational model is designed to be responsive and flexible. We will continually seek to improve, to learn from others and to ensure best practice in all areas of Kura life. As for our students, our performance goals for the Kura are aspirational.

### **1.0 Achievement.**

The achievement goals we will set for our learners include academic, social and emotional goals. These goals and their measurement are the evidence that our educational model is working and that all the other enablers such as student engagement, strong governance and management are in place. Central to the measurement of academic goals are the individual projects and a range of other tests (as discussed subsequently, in The Educational Plan). These include content area tests and standardized tests in numeracy and literacy. Overall teacher judgment is also used to measure against National Standards. Through this multi-pronged approach to measuring achievement we are able to develop a detailed and comprehensive picture of our learners; what they know and can do and what they need to know and be able to do. We are able to report on not only where they have come from and their current levels of achievement but also the next steps in their educational pathway.

We aim for all our year 7 students who are well behind to be achieving at or above the National Standards by the end of year 8. We acknowledge that in some instances, due to extenuating circumstances, this may not be possible but believe it is important that our expectations are set high for all learners. In this way we avoid deficit thinking based on assumptions. Baseline information will be gathered in the first year to set school and individual targets, the latter as part of setting each Individual Programme Base.

Year 9-10 student progress will be monitored through annual tests, unit tests and project marks (for details see The Educational Plan). Individualised Programme Bases will be regularly updated to reflect individual targets and students monitored to ensure progress.

Emotional and social outcomes will be measured through a range of formal and informal measures, some are listed below. These will include the use of appropriate survey tools, teacher observation, peer, family, whānau and community feedback.

### **2.0 Student engagement**

Student engagement is a complex measure that looks beyond mere attendance, or presence, at school. For students to be fully engaged in their learning a number of factors must be present as discussed here. The next four performance objectives measure this through assessing attendance, the culture/environment, and the engagement of students and community.

**2.1 Attendance:** Our goal is that all learners are regularly attending school, there are no unexplained absences and there is no parent-sanctioned truancy. This will be measured through normal attendance checks. Where there are concerns about attendance we will make contact with the families concerned and discuss any issues they may have. Every attempt will be made to find solutions to the underlying causes of poor attendance. If learners need to be absent for any length of time arrangements will be made to ensure they have the necessary resources to continue their studies. We aim to keep exclusions of any kind to a minimum by dealing with problems before they escalate, working in partnership with families and whānau and relevant community leaders.



**2.2 School Culture:** To ensure that learners want to come to UVMS and that they enjoy being there it is important that our Kura is a safe and inclusive learning environment; one where learning is valued and where all members of the community feel welcome. The expected norms of behaviour for all our community members include empathy and respect for others and for themselves, understanding and valuing diverse cultures, transparency and honesty in all interactions, and a willingness to listen to other points of view. These norms are in addition to the usual behavioural norms around safety, language, drugs use, violence etc. An ethic of care is at the heart of our culture. It is the responsibility of all members of the UVMS community to ensure this culture is maintained and enriched. This goal is measured through a range of informal and formal tools including community feedback, school leader and teacher observations and learner reflections.

**2.3 Participation by Learners:** We recognise that attendance alone is insufficient to ensure success. It is essential that all students are not only present at school but that they are also fully engaged and participating in all activities; both within the classroom and beyond. This will be achieved through the provision of a holistic, engaging and rich curriculum, delivered by enthusiastic and committed teachers. This deeper goal of engagement will be measured through behavioural records, achievement data and evidence related to the levels of participation in a range of co-curricular activities, by all students. Through engaging students we will also promote attendance. If learners want to be at school, if they enjoy school life, then both attendance and engagement and thus participation will increase.

### **3.0 Participation by parents, families and whānau**

It is important that parents, families and whānau are also engaged in their children's learning and participate in the wider life of the school. This objective is closely linked to engagement and our vision for the character of the school. We envisage an educational partnership, one focused on the learners and their potential.

A key role for the Community Liaison Manager will be to ensure that the community feels welcome at the school, that they are confident in offering support for the different learning programmes and that they utilise the services we will offer through our *whānau* space. It is also important that all school staff are supportive of the parents, families and whānau of our learners and encourage their participation in Kura life.

The extent and nature of engagement and participation will be monitored through records kept by the Community Liaison Manager, and through informal and formal feedback from the community. Observations and reflection by the professional staff will also enable us to monitor the success of the Kura in attaining this goal.

### **4.0 Efficiency and efficacy of systems and processes.**

Systems and processes currently in place at UVMS include financial, property and resource management, staff employment and appraisal, health and safety and all record keeping. Responsibility for ensuring these are effectively implemented and monitored lies with the Office Manager, who reports to the Business Manager.

Our governance model and management structures are discussed in the Business plan. Suffice here to say that we will continue to operate the highly successful Trust Board model we currently utilise with support from the VET. We will also ensure accountability and transparency through increased opportunities for the community to support our Trust Board

Our systems are set up to work within the budget we have, to ensure there is no debt and that there is a small surplus. With considerable experience in managing a tight budget we are confident our Business Manager can work with a budget that allows for a surplus of up to 5%.

## **Why we are needed**

As discussed above, the UVMS Trust is highly cognisant of the need for an alternative pathway for children from low socio-economic families in this area, and wishes to provide that opportunity beyond its current learners. This need is demonstrated both in the diversity of the growing population in the area and in the NCEA results from local schools. It is also evidenced in the support we have from local

community leaders. Our experience to date has confirmed that there are a significant number of students in the area achieving well below their potential. However, we are constrained in our ability to work with these learners and their families and whānau.

Despite our best efforts to help families from low socio-economic areas the biggest block to enrolment and retention is financial. A number of families have suffered economic set-backs in recent years and so have reluctantly removed their children or not followed through on enrolment plans. Very few families from the priority learner categories can afford even half-fee scholarships.

Further, while the provision of full-scholarships to one or two Māori children, the offspring of prisoners, has been attractive to some parents the children are not keen to attend a school different from their peers. As a result the offer has not been taken up despite the support of the Prison Fellowship Community Worker. It is clear to us, from this and similar experiences, that we need to offer free education or a significant number of full-scholarships to be able to reach and make a difference in the lives of many of our target groups. Becoming a Partnership Kura will enable this. While the wider community is served by state, integrated and independent schools the reality is that it is only those with the necessary income who can afford choice. The Partnership Kura model offers choice to those who currently have none.

Following is a summary of the key evidence to support our bid to become a Partnership Kura.

### ***The population we serve***

The demographic of the northern Hutt Valley is unusual for the high level of socio-economic diversity within a relatively small area. Instead of large areas of poverty, as can be found in other lower socio economic areas of New Zealand, there are pockets throughout Upper Hutt with more concentrated areas in northern Lower Hutt, notably Pomare, Taita and Naenae. As a result, the scale of the problem can appear diluted when looking from the outside. Further, New Zealand's largest prison, Rimutaka Prison with almost 1000 inmates, is located in Upper Hutt. Inmates' families live throughout the school's target area, in the poorer housing areas. There are also a number of refugee families who live in these areas.

The diverse nature of the population has resulted in fewer low-decile schools than might be expected. Priority learners are spread across many of the schools; not always well served by them but also not as visible as those in low decile schools. Trentham School, in Upper Hutt and close to UVMS, is a good example. Close to the school are wealthy streets as well as a large area of state housing. Over one third of the school population is Māori and Pasifika, the school runs a Breakfast Club, and close by is a new community house. The school, however, is decile 4.

Amongst those schools with an Upper Hutt City address there is one low decile primary school (decile 3) with the majority being between deciles 4 and 7. At the decile 3 school, in Maoribank, the student population is 60% Māori compared with 18% of all students in Upper Hutt City schools. There are also 12 decile 1 to 3 schools in the northern suburbs of Lower Hutt, from Stokes Valley to Naenae. These low decile schools cater for 2840 students of which 1023 are identified as Māori (36%), 862 as Pasifika (30%) and 639 as European (23%). These figures help highlight the extent to which priority learners are centred in specific areas as well as spread through the region. The location of UVMS, 7kms south of Birchville/Maoribank, 10 kms north of Stokes Valley, and 17 kms north of Naenae, and close to both bus and train stations, means we can provide for these students.

The population of the area is growing (since 2001 5.6% growth in Upper Hutt; 2.3% in Lower Hutt) and the number of young people exceeds the national figure of 21.5% under 15 years (22.1% in Upper Hutt; 22.9% in Lower Hutt) with the greatest growth rates in the priority learner groups. Figures for the whole Hutt Valley show a higher representation of the wealthiest and the poorest groups in society and a slightly higher proportion of Māori and Pacific people compared to the national average<sup>2</sup>.

In response to the growing lower-socio-economic populations in this area several community houses have opened in the last few years (Stokes Valley, Pomare, Timberlea and last year: Trentham). In

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<sup>2</sup> <http://www.health.govt.nz/new-zealand-health-system/my-dhb/hutt-valley-dhb/population-hutt-valley-dhb>

December 2013, a Community Development Facilitator was appointed to help better support and integrate into the life of Upper Hutt the growing number of low income, migrant and prison families who tend to be marginalised from the mainstream. Opening a Partnership Kura in the area will support the important work of these community houses and we will continue to actively engage with them.

### ***Special Needs in this area***

All areas of New Zealand, regardless of socio-economic status, have learners with special education needs. The Hutt Valley is no exception. We anticipate the proportion of learners with special education needs at the Partnership Kura will be greater than that of other schools in the community. This is currently the case at UVMS. We believe this is for two key reasons: parents of learners with special needs are more desperate for alternative schooling options that meet their child's needs; and some special needs disappear in a smaller, more supportive environment, making UMVS the ideal school for these learners. By becoming a Partnership Kura we will be able to extend our support beyond those with the financial means to access it.

We have suggested that approximately 9% of our learners are likely to have diagnosed special needs. This estimate is very conservative. It is based on information, in an ERO report<sup>3</sup>, which stated that half of the schools they reviewed reported that at least 7% of their learners had special education needs. Again there are currently few, if any, alternative options for these parents and their children in the Hutt Valley

### ***NCEA Results***

A study of the NCEA results for the Hutt Valley (Appendix 2) provides evidence that Māori and Pasifika learners are not achieving well in senior secondary schools in the area. As a middle school, we can work closely with these learners, their parents, family and whānau to ensure they are prepared for success, that they develop the necessary aptitudes, knowledge and skills to succeed. Teachers at the local state high schools tell us that there is little they can do when many students come to them, in Year 9, with reading, writing and numeracy levels well below the national standards. The main thing that motivates the Board of the Upper Valley Middle School to become a Partnership Kura is our belief that *it does not have to be this way*. We understand the difficulties schools face and we are aware of the good work they are doing, but more is required if the Hutt Valley is going to progress. We believe we can be part of the solution.

### ***Community Concerns***

UVMS has worked hard over the last year to build closer links with community leaders and workers connected with our priority learners. These people (Appendix 5) recognise the need, in this area, for extra help for young people in post-primary education among those they work with. Last year Naenae Primary School submitted an application to the MOE to extend their school to include Years 7-8. Parents and teachers in that community are keen to do something about the fact that too many of their young people experience a drop in educational achievement, get into bad company, and begin heading in a wrong direction once they leave primary school. The large intermediates, which students only attend for two years, do not always provide the support these young people need. This experience is not unique to Naenae.

## **The key advantages offered by our application**

We believe our application offers seven key advantages. These are related to the twin community approach, the age group we cater for, the proven educational model we use and the extent to which we already have systems, processes, structures and community relationships in place. Extending and reframing our school as a Partnership Kura will not be difficult; to the contrary we believe it is a natural evolution for UVMS.

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<sup>3</sup> ERO. (2012). Including Students with Special Needs: School Questionnaire Responses (April 2012). Author.

### **1. Two communities in one**

Our extension model is for the establishment of two separate learning communities operating within the one Partnership Kura. This is to enable us to maintain the culture we currently have; where all the learners and their families and whānau are part of an extended family. However, having two communities will provide for more learners and enable some economies of scale not possible with less than 50 learners. It will also enable interaction between the two communities and increase team-sport options.

### **2. We are a Middle School**

We believe there is room to expand the Middle School model in New Zealand. Despite the critical importance of years 7 to 10 to the ultimate success of young people there are few institutions in New Zealand which cater to their specific needs, needs which are heightened amongst the priority learner groups.

The majority of New Zealand learners, in Years 7 and 8, attend full primaries (37%) and intermediates (46%). Most Year 9 and 10 learners are enrolled in year 7 – 13 secondary schools (16%) or year 9 – 13 secondary schools (80%)<sup>4</sup>. A review undertaken for the Ministry in 2007, by Dinham and Rowe, and summarised by the Ministry in 2009<sup>5</sup>, highlighted the need for further research into the effectiveness of Middle Schooling but also provided evidence of their efficacy.

A middle school is able to provide the extra support and extension that students require at this age. It is able to focus its teaching and learning on their specific developmental needs. Most importantly, we provide parents, family and whānau with an alternative to the traditional provision for children aged 11 to 15, in New Zealand schools.

### **3. We use a successful educational model**

We believe the Villa Education Trust (VET) educational model with its unwavering focus on academic success, coupled with an inquiry based project model and an afternoon learning programme that reaches out into the community will be successful in enhancing educational outcomes for priority learners. Through the afternoon programme we will be able to provide a range of opportunities for the community to engage with our students, to support their learning and to be supported by them. This model has been tried and tested over a period of eleven years at MHMS. Its success in that time is well documented.

Further, the first years of operation at UVMS has shown that the VET model can be successfully transferred to other schools. It is recognised in the Upper Hutt community that UVMS is an ideal environment to progress the achievement of a range of struggling learners. The appended letters of community support are evidence of this (Appendix 5).

This educational model is expanded in the subsequent section of this proposal.

### **4. Our model is responsive to the culture and needs of our community and society**

The UVMS model can be readily adapted to meet the needs of our community; recognising and valuing the cultural capital they bring to the school. Our approach enables us to tailor the independent projects (Appendix 1) and afternoon programmes to the community within which we are working, while not compromising the morning academic programme with its focus on academic success within the New Zealand curriculum.

It is through these projects and programmes that we are able to enrich and extend the learning opportunities offered to our learners. In particular, we will be able to seamlessly integrate different cultures, languages and identities into their learning programmes. These will include both Māori and Pasifika cultures but also look beyond these to the refugee community and the wider world. We want our learners to understand their place in society and the responsibilities that brings.

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<sup>4</sup> Durling, N., Ng, L. & Bishop, P. (2010). The Education of Years 7 – 10 Students: A focus on their teaching and Learning. Ministry of Education

<sup>5</sup> Ministry of Education. (2009). Teaching and Learning in Middle Schooling: A Review of the Literature. Authors

### **5. Our Christian base fits well with core Māori and Pasifika values**

Our focus on applied Christian values has strong connections with many Māori and Pasifika cultural values and metaphors. As a Partnership Kura we will continue to enrich and develop these links through working collaboratively in the community in a productive partnership. The following Māori principles, for example, resonate with our own cultural and philosophical principles.

- *Whānaungatanga* (building positive relationships)
- *Aroha ke ti tangata* (a respect, regard for others, empathy)
- *Kanohi kitea* (visit, keep in touch, be seen to be actively involved)
- *Manaaki ke te tangata* (share and host people, be generous)
- *Kaua e takahia te mana o te tangata* (do not trample over the mana of the people)

We will continue to develop our understanding of these connections and of Māori and Pasifika cultural values and norms through our work with the community and through our curriculum. We consider such understanding to be an important part of the growth of UVMS and are excited at the potential to learn with our community.

### **6. We have community connections and the means to strengthen these**

Our links with community groups/leaders will ensure that we draw at least 75% of our roll from priority learner groups, the most needy groups in our community (Appendix 5). In addition, the enhancements we have planned will extend our community relationships and ensure strong links are built with the families we serve. These enhancements include the appointment of a Community Liaison Manager, the development of a *whānau* space within the school, and the purchase or lease of one or two mini-vans to transport students from areas (most notably Stokes Valley) that are not close to the main transport routes. If required, the Māori Women's Welfare League has already volunteered to help with transporting students from this area.

s 9(2)(a) OIA

We currently consult with [REDACTED] a local kuia, on ways in which we can incorporate more of a Māori world-view into the curriculum and make more connections with the Māori community in the northern Hutt Valley. We intend to develop similar relationships with other cultural leaders.

### **7. We already have rigorous systems, processes and procedures in place**

UVMS is now established, with much of the hard work of developing processes and systems, and working through the teething problems with new infrastructures completed. In 2015, we will be in a position to offer 104 additional places to priority learners, once we have completed our school extension. We currently have half of the school set up to go and are in negotiations to lease more buildings on our current site to extend the potential roll from 48 to 108 students.

The support of the VET means we have access to management and administrative support as required. This has added to our governance and management expertise and enabled UVMS to quickly establish itself. We envisage their continued support enabling an equally smooth transfer to a Partnership Kura.

Please note that all UVMS financial and organisational systems and processes are entirely separate from the VET. Their role is one of governance and quality assurance support.

## 6 EDUCATIONAL PLAN

### 1. Describe the curriculum to be used. If you are not using The New Zealand Curriculum or Te Marautanga o Aotearoa, please

- a) explain and provide evidence to support why you have chosen an alternative curriculum; and
- b) outline how your alternative curriculum aligns with *The New Zealand Curriculum* or *Te Marautanga o Aotearoa*.

UVMS uses the New Zealand Curriculum document as the foundation for our school programme. This Curriculum provides learners with the necessary skills, expertise and knowledge to succeed in the 21<sup>st</sup> century. It is important that our learners are prepared to enter secondary school with the requisite academic knowledge and skills to succeed at NCEA, these include the key competencies and values within the New Zealand Curriculum.

A feature of the UVMS implementation of the New Zealand Curriculum is that it is a project-based, integrated curriculum. We still teach the core subjects of Maths, Science, English, Social Studies and Technology but our integrated curriculum applies those subjects and the projects students do in a related manner. An Integrated Curriculum treats knowledge as being seamless and interrelated. An integrated curriculum is a means of breaking down the artificial barriers between subjects as they have been traditionally taught. It is also an effective way of broadening the possible topics that may be learned/investigated. Within the school's written curriculum, the staff ensure that all of the Essential Learning Areas (ELAs) are covered at the appropriate levels.

A project-based curriculum treats the investigation of a topic as the basis for learning. The students do eight projects during each year (Appendix 1). Within each topic the staff identify the areas of the national curriculum that need to be overtly taught within the ELAs. Each year the topics will encompass the full ELA requirements for that level. Within each set project, all of the Learning Areas are included and the students have the opportunity to direct their own learning and work to a depth and breadth that is difficult to achieve within a traditional structure. Their learning skills (e.g. goal setting, planning, investigative research, presentation, computing) are enhanced, as are their thinking skills (e.g. metacognition, evaluation, synthesising information).

Basic academic skills (reading, writing, mathematics) are in no way ignored but are enhanced and used as a building block for in-depth work.

### 2. Detail how you plan to teach and deliver your curriculum across all your proposed year levels.

The UVMS Curriculum is delivered through three learning programmes: the classroom based academic programme in the morning, the independent projects programme, and the afternoon programme. During the afternoon programme learners rotate through art, music, sport, and community based learning and service. Each year group follows the same delivery model.

In the morning, all year groups undertake class-based academic programmes in English, mathematics, science, technology and social studies. These programmes follow the New Zealand Curriculum and are designed to ensure all learners have the necessary skills to succeed academically both while at UVMS, and beyond, as they progress through senior secondary into tertiary education and/or the workplace. The nature and difficulty of the content to be taught is determined based on the needs of the learners in a particular year group, and the requirements of the New Zealand Curriculum. Learning is scaffolded to ensure that the needs of individual students are met; that all develop a sound understanding of the subject and of the world around them, as well as the skills to do well in that world.

The independent project topics are age and interest appropriate. They also cover a range of cultural perspectives providing each child with the opportunity to learn more of the world they live in. They are designed to cater to the diversity of interests and the range of learning styles within a class, and to enable the authentic use of the skills and knowledge gained in the morning academic programmes. During project based learning, the perspectives and understandings different students bring to the learning context are considered a valuable resource for the learning of all students. A sample project task sheet is appended (Appendix 1).

During the afternoon programme (art, music, sport, community learning and service), our learners have extended and practical opportunities to develop a greater awareness of their culture and identity and that of others. It is our intention that both art and music incorporate aspects of Māori and Pasifika culture as well as others that may be in the community. We will do this through the involvement of local community members. During Community Service they will be provided with opportunities to contribute to that community and to learn how they can make a difference. During Community Learning students learn from the community, usually from guest speakers and tutors. Language learning is timetabled as well as other experiences related to classroom studies e.g. visiting an artist, talking with a financial advisor, or doing a block of dance tuition.

**3. Explain how the teaching and delivery of the curriculum will produce better achievement outcomes for the priority learner groups.**

**Response**

We firmly believe in the importance and attainability of a solid academic education for all students, an education that will enable them to participate as members of society, contributing not only to the economic and social well being of New Zealand as a whole but also contributing to their local communities. We acknowledge there are barriers to achieving academic success for some students but do not see these as insurmountable. Our curriculum and the holistic, integrated teaching approach used to deliver it have been developed based on this foundational belief.

The evidence for our chosen approach to the delivery of the Curriculum can be found in international research into the advantages of Middle Schools, the proven value of an inquiry-based approach to learning, and the recognised need for all learners to be both literate and numerate. Much of this evidence can be found in research undertaken in New Zealand and is published on Education Counts in a variety of reports. It can also be found in the success of the VET educational model at both MHMS and UVMS.

Based on this evidence, we are confident that our integrated and project-based approach to learning, incorporating classroom based instruction, independent projects and a cultural/sporting and community focused afternoon programme, will meet the academic, social and emotional needs of priority learners. The flexibility, innovation and coherence that is built into our school, through the size of the roll, the timetables and the age group of our learners, enable us to develop the personalised and responsive learning environment necessary to enable the success of priority learners.

Further, our commitment, and that of our professional staff, to supporting all learners to realise their individual potential is critical to our success. Engaging and working with the parents, families and whānau of all students is also critical and we are committed to doing so. Our approach is also built around a collaborative model in which we all work together to support and guide our learners, to ensure they have the skills and knowledge they need to succeed. We value the expertise and knowledge resident in the wider community and utilise it to enrich and extend the learning environment.

We are not underestimating the challenges we will face but have confidence in our proposed approach and in the capability of all learners to achieve to their potential with sufficient – and appropriate – scaffolding and support. Our goals for our learners will be aspirational, achievable and cumulative.

The letters of reference and support (Appendix 4 and 5) showcase the value of this model for all students.

**4. Provide a full list of the qualifications that your school will offer (if applicable).**

**Response**

UVMS will include students from years 7 – 10 and as such will not offer formal qualifications. However, the considerable flexibility within our model does mean we can support academically able students to undertake NCEA level 1 at year 10, if appropriate.

**5. Explain why you are confident students will be able to achieve the National Standards (those in Years 1-8) or your proposed qualifications using the curriculum and teaching methods you have proposed. Be specific and provide evidence such as student achievement data where possible.**

**Response**

As stated above, our morning programme is focused on delivering the necessary content and skills for students to achieve academically. This learning is then further developed and reinforced through the independent projects. In this way learners have multiple opportunities to engage with the content being taught and to utilize what they have learned in authentic tasks. This is the broad mechanism through which we will ensure our learners achieve to their full potential within the National Standards Framework.

More specifically, the following are the primary means by which we will ensure our learners are able to achieve:

- High expectations for each by their teachers
- Engaging curriculum content delivered in multiple ways
- Small class sizes and a small school community enabling closer relationships with and greater support for individual learners
- Teaching that is responsive to individual learner needs and that recognises the range of ways in which individuals learn
- Close family/community/whānau relationships to ensure a holistic approach to overcoming barriers to learning
- Regular assessment (internal and external checks are used) to identify problems including standardized literacy and numeracy testing, content tests and project marking.
- Quality teachers and excellent school leadership
- Excellent school governance and robust systems and procedures

This approach is described in our Information Booklet as follows:

*“The UVMS school curriculum is designed to be testing and stretching for students of all levels. There is good reason for stretching students at Year 7 – 10 and absolutely insisting that they progress through class and project work with diligence and patience. This will set them up to succeed in their study for qualifications at Years 11 – 13 and on into their tertiary education and adult life. They will have learned to focus, self motivate and persevere in their studies, understanding that learning and achievement is their responsibility. It is not about making excuses or blaming the system.*

*Years 11 – 13 are very focused on internal assessments, and preparation for exams. If we constantly allow our children to opt out of challenges, if we make excuses for them, if we give in to their demands to take away those things that require knuckling down and working hard - it might look like a favour today but we will be lowering the bar and creating problems they will have to face a little further down the path to learning.*

*Developing self-esteem is not about making everything in life easy for your children. It is about encouraging them to face difficulties with a plan and the drive to persevere until they overcome and achieve positive results.*

*Students of all ability levels require regular and consistent study routines. Parents/whānau and teachers help them develop these with a goal in mind. As these basic routines become habits they themselves become freer to focus and to think more deeply.”*



**6. If you plan on targeting Māori students, outline your plans for:**

- c) achieving success for Māori in education, so that students are enjoying and achieving success as Māori**  
**[www.minedu.govt.nz/theMinistry/PolicyandStrategy/KaHikitia.aspx](http://www.minedu.govt.nz/theMinistry/PolicyandStrategy/KaHikitia.aspx); and**
- d) supporting Māori language in education: delivering strong, co-ordinated effort and investment**  
**[www.minedu.govt.nz/theMinistry/PolicyAndStrategy/TauMaiTeReo.aspx](http://www.minedu.govt.nz/theMinistry/PolicyAndStrategy/TauMaiTeReo.aspx)**

**Response**

At the heart of our approach is a belief that the best thing we can do for all our learners is ensure they meet their potential as individuals with their own identities, aspirations and values. These identities, aspirations and values are developed, in part, by their cultural heritage, by the communities they live in and the expectations of the wider world. Our role is to enrich these, to build on the foundations and the cultural capital our learners bring to school.

For those of our learners who are of Māori descent it is critical that they know we respect and value their cultural heritage, that we want them to succeed as Māori, as young people who can enrich our school and the wider community. Further, we welcome and celebrate the richness of Māori culture recognising the special place it holds in New Zealand society.

Our Community Liaison Manager will work with whānau to build the school's understanding of their community and to help build whānau understanding of, and involvement with, the school. We anticipate that the relationships the CLM develops will further enrich our curriculum (see below) and help it to continually adapt to the school community.

We will ensure that a Māori world view is incorporated into our curriculum and school life and that our learners are given extended opportunities to engage with and learn from Māori kaumātua and others in the community.

Following are our current plans for ensuring Māori learners enjoy and achieve success as Māori. We will continue to discuss these with our community as part of our regular reflection, feedback and review loops prior to making changes as necessary.

- Our academic curriculum already includes many Māori related topics. For example, in social studies, we include topics such as *How Māori, the Vikings of the Pacific, first came to NZ*, and *An introduction to pre-European Māori culture*.
- In addition, Māori approaches/views are normally incorporated into other topics being studied e.g. when we are studying law and justice in New Zealand we include Māori customary law and justice. In English we include stories by Witi Ihimaera, Patricia Grace and other Māori authors; in design technology we have a unit on Māori carving when a local carver is available.
- Beyond the classroom curriculum, Māori learners will be encouraged to complete project tasks in ways that further develop and enrich their confidence as young Māori, and their understanding of what that means. We would envisage them being supported in this by not only our teachers but also parents, whānau, mentors and peers in the wider community.
- During the afternoon programmes we will incorporate Māori music, dance and art as part of an extended cultural and arts programme. These will provide authentic opportunities for young Māori learners to develop their cultural capital and to see it valued in the school.
- Through our Community Learning programme we will continue to encourage and support the involvement of the Māori community in ways that recognise and value the Māori world view. For example, when studying architecture we visit Orongomai Marae for an introduction to how Māori culture is passed on through the design of the meeting house and how it is built. When we are studying NZ writing we will invite an author to speak to the students and we also invite a kuia to tell us stories of her childhood and the stories she heard and passed on to her children and the influence of these stories.
- Our Community Service programme will include activities such as developing our garden in a Māori way, with karakia before planting and after harvesting, planting to fit with the cycles of the moon, and planting traditional Māori plants.

(Appendix 5, page 21, a local teacher and community worker comments that our integrated, theme/project focused way of doing education, with a Christian/spiritual base, and a holistic approach, works well for Māori children.)

Te Reo will be taught across the year levels as part of the curriculum. In addition, opportunities for language development will be available during music, art and project work. We would welcome, for example, the choice of a learner to write a story in Te Reo rather than English, or to present facets of their project work in Te Reo. Visits to Marae and other community based learning activities will also provide opportunities for learners to engage with and utilise Te Reo. Through these activities, the Māori language will be supported and profiled. Again this will be a multifaceted approach including scheduled, year group learning opportunities and independent opportunities for those students who wish to expand their knowledge.

**7. If you plan on targeting Pasifika students, outline your:**

- e) plans for achieving Pasifika success using students' identities, languages and cultures as foundations to build upon [www.minedu.govt.nz/NZEducation/EducationPolicies/PasifikaEducation.aspx](http://www.minedu.govt.nz/NZEducation/EducationPolicies/PasifikaEducation.aspx) ;**
- f) how the school will build its own Pasifika capability; and**
- g) how partnerships (as identified in question 14(c)) with Pasifika parents, families and communities are used to achieve Pasifika Success**

**Response**

As with our plans for ensuring Māori learners enjoy and achieve success as Māori, we are also committed to offering the same opportunities to Pasifika learners. We are cognisant of the different cultural groups encapsulated by the term Pasifika and for the need for our school to be aware of the diversity of language and culture.

As with all our learners, we will view each Pasifika learner as an individual with their own values, aspirations and backgrounds. Each has different stories to tell and different views to express. Again our flexible programme, the independent learning opportunities it provides, our collaborative approach with the wider community, and the work of our Community Liaison Manager will enable us to showcase and utilise the vibrant Pasifika cultures that our learners will bring to the school. It will also help us to recognise and respond to the concerns of the Pasifika groups and families in the school community.

Just as we intend to incorporate Māori art, dance and music so too will we endeavour to incorporate the culture and art of the Pasifika nations. Again individual learners will be encouraged to showcase their cultural heritage in their project work. We will also ensure that opportunities to engage with Pasifika history and culture are included in the academic programme.

We will raise the Pasifika capability of our school through our engagement with the Pasifika community we are serving. By working with them to ensure their learners succeed, our school will also learn. We will take time to listen to leaders and others from the Pasifika community, to learn about protocols and traditions. By bringing Pasifika community members into our school, our teachers will also be provided with rich learning opportunities. We acknowledge this may take time, but we recognise the importance of working with the Pasifika community and we will be proactive in ensuring this happens.

We envisage at least one professional development opportunity for our teachers to be focused on engaging with and understanding the needs of Pasifika learners and their families, how best to meet them, and how to work more closely with them. This would take place early in 2015. Further, we will ensure that all staff have access to a cultural advisor as needed and that they are supported to reflect on their own practices as they pertain to the Pasifika community.

UVMS already has links with a couple involved in Pasifika leadership (Appendix 5, see Sina letter). If we become a Partnership Kura they are keen to extend our connections to other Pasifika leaders. These leaders will partner with us to locate groups of students to come to our school. They will also help us find suitably qualified Pasifika people to assist in the school programme.

- 8. Outline how you will ensure an inclusive environment for students with special education needs, including:**
- h) how the school will demonstrate inclusive practices;**
  - i) how the school will build its capability to address the needs of students with special education needs; and**
  - j) how partnerships with parents with students with special education needs are used to achieve education success.**

**Response**

With our small classes we are well positioned to ensure equal opportunities for students with special education needs. In a smaller, more supportive environment, we have already found that the special learning needs of some students do not manifest. For others more is needed and we are well placed to provide the necessary support, as part of our holistic approach to the needs of all individual students (Appendix 4 - letter 1 is a good example of this).

We work closely with parents, families and whānau to develop an individual plan (Appendix 3, Individual Programme Base) for each child that recognises and meets their individual needs. We do not subscribe to the view that learners with special needs cannot achieve nor do we treat learners with special needs any differently from others. All learners are valued and respected, encouraged in their aspirations and supported to succeed. We expect all our learners to not only be present at school but to be actively engaged and participating. We value effort and determination; success is measured against individual goals and aspirations.

It is an important focus of the school that all learners are valued and respected. Bullying of anyone is not tolerated. This is reinforced by the community service programme in which students sometimes work at Kimi Ora, with severely disabled students. It is also reinforced within the Christian principles that underpin the values and ethos of UVMS.

UVMS staff will make use of all the support and education available for those educating learners with special needs. We will continue to work with and learn from local RTLB and Speld teachers and other professionals. Further, we will continue to work with parents to help learners with special needs, learning from them and helping them out of our experience and knowledge.

Our focus will always be on how to help all the learners we have to reach their potential.

- 9. If you propose to operate a secondary school and are planning to offer a full subject range, explain how this will be resourced within the funding levels set out in your financial plan.**

**Response**

UVMS is a secondary school in that we teach to Year 10. However, we do not offer any NCEA classes. The funding supplied is sufficient for our needs.

- 10. If you are proposing to provision for 0-8 year olds, explain how you will manage the requirements set out in the ECE regulations and the obligations of a Partnership School as set out in key documents (including legislation and the contract).**

**Response** N/A

**11. Detail tests, measures and tools, or other assessment tools that you propose to use, including:**

- k) how student progress and achievement will be measured, tracked, reported and responded to, particularly in relation to National Standards (if applicable); and**
- l) how assessment and/or aromatawai will be used to tailor instruction.**

**Response**

***Assessment tools***

Student progress and achievement is measured, tracked and reported using a range of tools. The core assessment tools we use are described below. Overall teacher judgement, based on the evidence from these assessments, and their observations of students is used to measure against National Standards.

1. We use external tests: PATs and the Australian maths, science and English ICAS testing at all year groups to ensure we are adding value to our students and to identify those who may need additional support. Both sets of tests provide valuable evidence of a learner's skills and knowledge compared with others of the same age group. The ICAS tests have the additional benefit of direct comparison with a wider population than the PAT tests. These tests provide teachers and parents with confidence that school assessments are relative to accepted benchmarks.
2. The single most comprehensive student assessment tool is the eight completed projects in each year. These cover each of the learning areas through a series of applied tasks. Learners and their parents are provided with a full assessment schedule for each project. This includes whether each task achieved a no credit, credit, merit or excellence and teacher comments on that task. The overall quality is assessed across all tasks with a comment. Appendix 6 contains a copy of a student's project assessment record.
3. At the end of every project (i.e. twice each term) the students are tested through content tests based on the traditional subject divisions and directly linked to the New Zealand curriculum. This is to provide certainty to our parents that their children are being advantaged by the mode of learning we are using and to give them a comparison against standard New Zealand school criteria.

Collectively the above assessment activities enable teachers to develop a comprehensive picture of individual student achievement, their strengths and weaknesses, and to tailor instruction accordingly. This could include adapting the next module of work or putting additional support around an individual learner. It could also include ensuring a student is stretched and encouraged to push themselves further.

***Reporting***

Results from the assessments described above are collated and reported in a variety of ways. This is to ensure, parents, family and whānau; learners themselves, and teachers have access to a comprehensive picture of the individual learner and their achievement.

1. Results from all assessments are collated in the **individualised programme base (IPB)** that each learner is provided with. This document (Appendix 3) identifies their interests, strengths, areas needing development, goals and progress measurements. The IPBs enable a consideration of the individual needs and circumstances of each learner when making curriculum decisions and planning classroom activities. This is to ensure that all learners are provided with a clear pathway forward. Development of the plans will be a negotiated and collaborative process between staff, learners, their parents, family and whānau. We acknowledge that it may take some time to develop the necessary relationships to fully realise the potential of the IPBs to enhance individual student learning. However, we envisage the development of these documents as a tool for deepening home-school partnerships and as concrete evidence of our commitment to working with parents, family and whānau.

2. Two formal written reports are sent to parents. These are issued at the end of Term 2 and again at the end of Term 4. They are comprehensive, in plain language, and easy to understand. They include grades for achievement across all learning areas for both achievement and effort and a summary of completed project levels. There are comments for each learning area explaining the grades achieved. The Community Liaison Manager will monitor how accessible these reports are for parents, families and whānau and what improvements are possible.
3. Students regularly receive formal and informal feedback on their progress, on what they have done well and where they still need to improve. All tasks are thoroughly marked and discussed with individual students.

Twice a year the Academic Manager will be expected to report to the Upper Valley Trust Board on:

- The progress of the learners in the school.
- The quality and extent of collaboration with the community including parent, whānau and family engagement.
- The overall management and administration of the school.

This reporting will not be onerous but will focus on key successes and on any issues that need to be brought to the attention of the Trust Board.

### ***The use of assessment to inform teaching and learning***

The purpose of all assessment is to ensure that there are shared understandings amongst professionals, learners, their parents, families and whānau regarding the level of achievement of individual students against expectations, the progress they have made and the areas still needing improvement. These understandings are of what students should be learning, what they have learned and what they need to learn.

Through the collection and analysis of a range of evidence, informed decisions about the needs of individual learners can be made. All our teachers are expected to review and reflect on their teaching practices, to consider the achievement of the learners in their classrooms and to ensure that their practices are informed by evidence. They are required to demonstrate how their planning reflects the needs of their learners as evidenced across all assessment activities.

Further, through making the overall expectation that all our students will achieve to their potential clear, through the collection of evidence regarding what they have learned, and through the shared identification of the necessary next steps the outcomes for each student at UVMS will improve. The key to this is the planning of appropriately focused, personalised learning programmes, something that is a core feature of the Villa Education Trust model.

#### **12. Explain how your school will:**

- m) **work with students, parents, families/whānau and community to promote high attendance levels**

##### **Response**

The inclusive culture of UVMS and the extensive and varied learning opportunities offered will be a key driver in promoting high attendance levels. We want our learners to want to come to school each morning. However, we are also realistic that it may take time for students from amongst the priority learner groups, their parents, families and whānau to engage fully with us in collaborative and productive partnerships. Much will depend on the extent to which their previous experiences with schools have been positive.

While we will take a strong line on attendance we will not be punitive. This would achieve little if there is a core issue with perceived authority and the value of schooling, or if there are social or economic barriers to attending. The Academic Manager will have overall responsibility for attendance and for putting in place any measures necessary to achieve our goals. The Community Liaison Manager will be supported to work closely with any families for whom attendance is an issue.

The school will be proactive rather than waiting for the problem to escalate, looking for solutions to any barriers to attendance. We will engage with other organisations (e.g. community workers) to find solutions. However, if the problem persists we will not hesitate to involve the appropriate truancy authorities.

We also recognise the important role teachers play in promoting and supporting links with the community and in engaging and motivating learners. Presence alone is not enough, participation and a focus on achievement in the classroom is also needed. This is the preserve of the classroom teacher to facilitate. If learners are actively engaged, see purpose in what they are doing, and feel that their point of view is valued, they will be more likely to attend school. The Academic Manager will work with the teachers to ensure their classrooms are positive learning environments for all learners.

**n) develop family-school partnerships that focus on strengthening support for learning, improving communication, and encouraging parent/family/whānau involvement in school operations**

**Response**

We have observed, in other schools, that parent evenings at set times for set purposes are not always successful. They assume a level of flexibility in people's lives that may not always be the case. They also presume that all families feel comfortable coming into a school for formal events. Our approach is to provide more flexible and individual opportunities, to build relationships with people over time.

We will include a *whānau* space in the school, a place where families can feel comfortable, can access a computer if need be and can get advice from our Community Liaison Manager. They will also be able to talk informally with teachers, look at their children's work and see what happens in the school. The furnishings of this space and its name will be finalised during our initial consultations with the community.

Parents, family and whānau will always be welcome to drop into the school, observe classes and to discuss things with the Academic Manager or Community Liaison Manager. They will also be welcome to make more formal appointments when they see the need. As discussed elsewhere we intend to create a *whānau* space to facilitate this. In addition, we envisage the use of community members as tutors and will welcome support from parents, family and whānau as learning resources.

Our Community Liaison Manager will have a critical initial role in developing these partnerships. Sustaining and further developing them over time will also require commitment from the other professionals within the school. While collaboration and productive partnerships is a two-way relationship the reality is that, in most instances, the professionals will need to lead the way, to take the initiative.

**o) work with parents/families/whānau and community so they have the information and training they need to better support and become more involved in the learning process**

**Response**

We intend to offer a range of programmes and support groups for our wider school community using UVMS as a resource. Ideally, these will involve local community organisations/workers/leaders to promote independence and sustainability. It is not our intention for the community to become dependent on us. We see our role as supporting them to become self-reliant through education.

Our current thinking includes budgeting advice, computer literacy, ways to support their children with reading and other learning activities. This thinking will be further developed and finalised in consultation with the local community. It may also prove more beneficial to offer such programmes in community houses.

The programme offered will be flexible and designed to meet identified need. We realise there is no guarantee this service will be utilised, at least in the early days, and our Community Liaison Manager will need to be very proactive and to listen to what the community wants. We will review our approach with local community leaders and make changes if it is not realising the desired benefits

We currently have students who do half their homework at school and complete the other half at home. For students who cannot easily work at home the local community house could be an option for completing their homework. In order to facilitate this we will discuss, with the community houses, the possibility of setting aside a homework room for those students who cannot find a quiet space at home. Some local community houses and marae already provide after-school homework support. This has the advantage of helping students develop their own personal disciplines in an appropriately resourced location.

**p) communicate with parents/families/whānau and community concerning the school's progress and achievements**

**Response**

We will develop and implement a communication plan that reflects the nature of the community we will be working with as a Partnership Kura. We want to ensure that information is easily accessible and understood. At a minimum, we will use the local newspapers and the school website for both reporting on progress and celebrating success. Other potential communication channels include local organisation newsletters and community meetings. We also anticipate being able to use community houses and libraries as information centres if required. Through our Community Liaison Manager we will ensure we are aware of any opportunities that may arise.

Currently, our teachers use email, phone calls, texts, and informal interactions at pick-up and drop-off to inform families in the school community of progress and achievements. Individual discussions are held on demand, usually after school has finished, sometimes in the evenings. Individual emails are sent when required, sometimes weekly. Emailed newsletters are sent on a weekly basis. There is also a school news page on the website (<http://www.uppervalley.school.nz>). We will not assume that all families have access to email and the internet. Rather we will check this and where necessary determine a more appropriate means of communication.

Determining who can access email and the website and finding practical alternatives for those who can't will be the responsibility of the Community Liaison Manager. There is currently one family at UVMS for whom we provide a hard copy of all communications.

Twice a year reports are posted home and opportunity is made for families to discuss these if required. There are other opportunities for communication during the year such as the School Information Evening, early in the first term, and the parent/care-giver/grandparent dinners during the second term. This year we are trialling a family evening once a term. The next family evening involves star-gazing with a local astronomer, for all the whānau. A parent-student unihoc game is also proposed. If these are well supported they may prove to be a useful way of building relationships and developing informal means for communication. The end of year prize giving is the formal forum for celebrating the successes of the year and reporting to learners and their parents.

**13. Explain the relationship your school intends to build with community agencies and organisations that serve students who attend the school.**

**Response**

We currently have relationships with several community workers who, like us, are committed to the progress of struggling families in our target community. All these community workers are keen to see more of those who they work with succeeding in school. (Appendix 5 contains letters from some of these people.) A number have already helped us to identify priority learners who could benefit from UVMS but we have, almost invariably, hit the brick wall of lack of money or the concern to see a group of their peers come to the school with them. These relationships will be extended and strengthened if we become a Partnership Kura.

We are very keen to build on and extend, for example, already close relationships with the primary schools in this area, particularly those in the areas of greatest need. Through our community service programme our students have worked in Maoribank School (buddy-reading and sporting activities) and Fraser Crescent (helping new entrants with art work). We also have connections with other primary schools. Unofficially, some of the local primary school staff are keen for us to succeed. They have told us of their concerns at what happens to some of their students when they go to intermediate. One

Deputy Principal says that Māori students, in his experience, seem to go *backward* the most; that the intermediate transition, at this age, into a big school does not work well for them.

We envisage UVMS working closely with many existing community groups to ensure that the parents, families and whānau of our learners are in a position to support their children's educational achievement. One way we can do this is to ensure there are brochures and other information available in the *whānau* space for families to access. This could include information on support groups, local courses or other community activities.

Where appropriate we will use local agencies and community groups to run courses for our wider community at UVMS. We also intend to use these groups within our afternoon programmes, in particular the community-based learning sessions. This could include community tutors working with our learners and our learners working within the community.

**14. Outline any commitments that the school has made for partnerships or other relationships with community organisations or individuals that would enrich the learning opportunities for students attending the school.**

**Response**

UVMS has no formal partnerships beyond the one it has with the Villa Education Trust. Under that agreement we are able to deliver their educational model and utilise all documentation and systems including curriculum templates, policies, reporting tools and assessments.

We have relationships with a range of community workers/leaders in our target area who are very keen to see another educational option in the area. They assure us that they, and their networks, can ensure we have at least 75% of our applicants from priority learners in our target area.

We currently have positive working relationships with the following groups. We envisage these continuing and other relationships being formed.

- *Matariki and Stepping Stone preschools*. Both these are in close proximity to UVMS and our students regularly work with groups of children from these preschools.
- *The Upper Hutt IHC Base*. In the past students have completed craftwork with groups from this organisation. They use some of the community gardens next door to the school and our students support them with their gardening activities.
- *Kimi Ora* (cerebral palsy school in Naenae). Last year a group of students learnt to help out as required.
- *Maoribank School*. In 2013 a group of students played/helped with team sport at this school and they also did some buddy reading with older students.
- In 2012 students cooked for various foodbanks, with a *SuperGran*.
- *Fergusson Rest Home*: This year a group of students play board games with and do crafts with elderly folk.

As part of our community learning *programme* we have existing arrangements with various individuals and groups to come and talk to us about their work or we visit them e.g. a representative from the city council; a soldier; an inventive local company; a book-binder; a builder; a clown; an author; a lawyer; a kuia. Again this would continue.

In recognition of ourselves as global citizens we sponsor a Fijian deaf child and are developing a sister-school relationship with the Deaf Hostel and the Gospel School for Deaf who care for and educate him. The UVMS community works together to raise money for this child. We see no reason for these activities not to continue.



**15. Detail any plans to use external providers to deliver parts of the educational programme (if applicable). Provide a full explanation of how this will work in practice.**

**Response**

We have no plans to use external providers to deliver parts of the academic programme. We do, however, call on the aid of external experts to help us deliver afternoon activities such as swimming classes as part of the sport curriculum for a term. It is anticipated that all our sporting requirements will be met by local providers. Contracts are negotiated with the sport providers on a case-by-case basis. The targeted use of external facilities and professionals not only ensures our learners have access to high quality experiences but is also cost-effective.

External experts are also invited to participate in the afternoon programmes providing opportunities not only for our students but also for the professional staff. Authors taking writing workshops, having an artist take a workshop on Māori art, or a historian describe some local history are all examples of professional learning opportunities for our teachers within curriculum delivery.

**16. Explain and provide evidence to support your proposed school calendar setting out:**

**q) the daily hours of operation;**

**Response**

The following points describe the daily hours of operation:

- The daily hours of operation are from 8:30 am to 3:15 pm.
- The morning programme operates from 8:30 to 12:50 with one main break (20 minutes). There are four, hour-long periods scheduled in this time.
- Each year group has one hour of independent project time per day, in the morning programme.
- There is a different timetable for each year group, rotating through the same subjects at different times.
- The afternoon programme operates from 1:30 to 3:15 providing an extended period of time for art, music, physical education or community based activities. Each year group rotates through art, music and their community programmes. All year groups do physical education/sport at the same time one afternoon per week to allow for team sport.

We will work closely with the other Villa Education Trust schools as we review, refine and adapt our processes and systems to meet the needs of priority learners. We are currently trialling a homework session after school (3.30-4pm Mon-Thurs) to help students form homework habits. We anticipate work will have to be completed at home, in addition to this homework session. So far we are finding that getting some of the work started at school is leading to the establishment of much better habits.

**r) indicative student timetables; and**

**Response**

The following is the 2014 timetable at UVMS. These times vary slightly to allow for assembly (Wednesday) and running (Monday and Thursday).

**Monday and Thursday times**

Period 1	8:30 - 9:25
Period 2	9:25 - 10:20
Run and break	10:20 - 11:00
Period 3	11:00 - 11:55
Period 4	11:55 - 12:50
Lunch	12:50 - 1:30
Afternoon programme	1:30 - 3:15

**Wednesday times**

Assembly	8:30 – 8:50
Period 1	8:50 - 9:45
Period 2	9:45 - 10:40
Break	10:40 - 11:00
Period 3	11:00 - 11:55
Period 4	11:55 - 12:50
Lunch	12:50 - 1:30
Afternoon programme	1:30 - 3:15

A Year 7s' timetable follows. All other year groups have the same content as they rotate through the same programme but at their own year level.

**Year 7 Timetable**

	Monday	Tuesday	Wednesday	Thursday	Friday
<b>8:30 - 9:30</b>	Maths Mrs Snedden	English Miss Rush	Maths Mrs Snedden	English Miss Rush	Social Studies Miss Rush
<b>9:30 - 10:30</b>	Science Mr Whyte	Social Studies Miss Rush	D. Tech Mr Whyte	Social Studies Miss Rush	English Miss Rush
<b>10:30 - 10:50</b>	Break	Break	Break	Break	Break
<b>10:50 - 11:50</b>	Independent project work	Maths Mrs Snedden	Independent project work	D. Tech Mr Whyte	Independent project work
<b>11:50 - 12:50</b>	D. Tech Mr Whyte	Independent project work	Science Mr Whyte	Independent project work	Science Mr Whyte
<b>12:50 – 1:30</b>	Lunch	Lunch	Lunch	Lunch	Lunch
<b>1:30 - 3:15</b>	Art Mrs Snedden	Community Service	Music Miss Leggett	Sport	Community Learning +

- s) **how the school day and year will be organised to include instruction and assessment, independent study, professional development, parent-teacher conferences, and extra or co-curricular activities.**

**Response**

We intend to retain the basic organisational model currently implemented at UVMS. This is the Villa Education Trust model and as such has been refined and enhanced over the past ten years. Any refinement or review would be undertaken in conjunction with the Villa Education Trust Board. We have appended our 2014 school calendar, which highlights the key events and organisation of the school (Appendix 7).

The following key points relate to the organisation of the school day and year:

1. The **school calendar** follows the standard four-term model (Appendix 7). The dates are determined each year based on Ministry guidelines. In light of our longer school day, however, there are three weeks holiday in the middle of the year and the fourth term breaks a week earlier than most schools.
2. **Curriculum delivery** is in blocks (four or five weeks) with two blocks per term. Students complete one independent project per block. The morning academic programme is also based around these blocks ensuring that what is learned in the classroom is directly related to the curriculum area tasks in each project.
3. **Assessment** is also structured around these blocks. There are content area tests in each learning area at the end of the four or five week units and the projects are marked as described earlier. This provides a comprehensive review of learning outcomes twice a term.
4. We do not hold formal **parent-teacher conferences**. There are year group parent and whānau meetings at the start of each year (the School Information Evenings). During these meetings the Academic Manager outlines the year, the schools' expectations and its overall philosophy to each year group. There is an opportunity for questions and for the parents to meet each other. Parents, family and whānau will always be welcome to meet with and speak to the Academic Manager and other staff. An open door policy currently exists and we believe that the Community Liaison Manager and *whānau* room will make this welcome more tangible.
5. Our **Community Forum** group (for more information on this group see question 24) will meet each term. This will provide an opportunity for the Academic Manager to report on the progress of the school, on the project work that has been completed and any other matters. The Forum representatives will also be able to ask any questions, raise concerns and offer guidance.
6. **Professional development** will be on an as-requested basis. All requests for professional development will be approved by the Academic Manager and then forwarded to the Business Manager. It is anticipated that most professional development and learning will occur outside classroom time to minimise disruptions to learning. However, this will be decided on a case-by-case basis.
7. Annual UVMS events include a **formal prize giving** at the end of the year. Last year this included speeches from students and a musical item. With increased numbers we will hold a **speech contest** at the end of term 2, and develop a **cultural performance evening** at the end of Term 3. During Term 3 UVMS will hold a special day in which grandparents and other family members are invited to visit the school, as part of our building stronger links with the community. As mentioned earlier we are currently also trialling family evenings once a term.

**17. Outline the school's philosophy and methodology regarding student behaviour, discipline and participation in school activities.**

**Response**

The opportunity to learn and to participate in the full curriculum offered at UVMS is a privilege not a right. With that privilege comes expectations and responsibilities.

The removal of privileges is the first step in any disciplinary action and is only undertaken when a learner has clearly violated expectations. This can occur at an individual or year group level and at the discretion of the Academic Manager. The second step would be for the student, their parents or whānau to engage in discussions with the Academic Manager and Community Liaison Manager to find a solution moving forward.

At UVMS it is presumed that all students, their families and whānau will meet expectations. Where this does not occur every effort will be made to solve issues and to reach shared understandings through dialogue and agreed supports. It is not the intention of the Trust Board that punitive measures are taken unless absolutely necessary. Rather we expect the school leadership to act in a proactive manner, to be aware of the needs and circumstances of individual learners, and to place the necessary supports around them to enable them to meet expectations.

The Academic Manager has overall responsibility for the behaviour of all learners and will work closely with the Community Liaison Manager to ensure that all learners, their families, parents and whānau understand and support UVMS in maintaining the expected standards.

- 18. Set out your strategy, policy and procedures that will ensure the school is a safe, orderly, and drug-free environment where both teachers and students can feel secure and where effective learning can take place (in line with the provisions under the Education Act 1989 and any other applicable Acts).**

**Response**

The Trust Board, in conjunction with the Academic Manager, will work to ensure that UVMS is a safe, orderly and drug free environment. They will act in accordance with the Education Act and any other applicable acts.

Every child who comes to UVMS to learn has the right to do so in a safe and orderly environment, with no distractions. There is a no tolerance policy with regard to drugs or violence within the school. Our Community Liaison Manager will work proactively to ensure that our parents, families and whānau understand and accept their responsibilities and agree that their children will abide by the school rules.

We understand the potential difficulties some priority learners may have in meeting our expectations in the early days. We will, however, accept all students at face value, according them a high level of respect and trust in the first instance. Where a student struggles to meet our expectations we will work with their parents, family and whānau as well as the local community to find a solution and to help that student move forward. The safety of other students will be of paramount importance and it may be necessary to find solutions outside the school.

Our community education programmes will support parents, families and whānau to make the right decisions and to help their children do so. Our philosophy is one of proactive rather than punitive responses. We will consult widely where necessary and work through issues on a case-by-case basis.

- 19. Detail your proposed professional development plans for teachers, administrators and other school staff, including:**

- t) how the sponsors and/or the management team will be involved in the design and identification of such opportunities**

**Response**

The identification and design of professional learning opportunities is the responsibility of the Academic Manager, in conjunction with the Business Manager. Individual staff requests are first made to the Academic Manager who then makes a recommendation to the Business Manager for final approval. In some instances these may be referred to the Trust Board.

The review of assessment at the end of each academic block is a core professional learning opportunity. We place a high value on these opportunities for our professional staff to reflect on their own practice using the evidence collected from student assessments. Through these review processes our Academic Manager is able to identify professional development opportunities and needs.

As previously described, the use of specialised tutors and external experts in the afternoon programmes provides opportunities not only for our students but also for the professional staff.

The Business Manager will identify any professional learning needs regarding management and administrative processes. Again these will primarily be identified through regular review processes.

**u) the support and mentoring proposed for any staff that are not registered teachers (if applicable)**

**Response**

Our model ensures that the daily administrative and business operations of the school are not the concern of our Academic Manager providing time for them to mentor and support all teaching staff. This is undertaken both informally and formally.

Our school operates on an open-door policy with the Academic Manager regularly visiting classes to observe learners and their teachers, to provide support to teachers and to ensure they are fully engaged with teaching and learning across the school. We believe in a professional learning environment with none of the siloed, behind classroom doors practices, that can occur in some schools.

We will encourage and support any non-registered teachers to become registered while working at UVMS.

**v) how your proposed programme of professional development will enable the school to meet the needs of priority students.**

**Response**

Our professional staff maintain an uncompromising focus on student outcomes, meeting the needs of their students at all times. They are able to do so because of the nature of our timetable and the removal of many of the administrative tasks other teachers have. They are supported and encouraged to reflect on their own practice and that of others, to learn from each other, and to challenge their colleagues to be aspirational in their curriculum delivery.

High expectations, a focus on outcomes and on delivering an engaging and rich curriculum are central to the culture of UVMS, of the way things are done. Professional learning and development is an ongoing process that occurs both formally and informally. We expect our teachers to be continually seeking to improve their practice, to find new ways to engage and motivate learners and to be looking for new ideas and practices.

**20. If you are proposing to use non-registered teachers, explain what subjects they will teach, what experience or skills you will require, and the role they will play in the day-to-day operation of the school.**

**Response**

We are looking for registered teachers to fill all our positions but if no one suitable is available we will accept suitably qualified and skilled people with the understanding that we are keen for them to gain a teaching qualification as soon as possible, and will support them in that.

## 7 BUSINESS PLAN

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21. Outline the different structures (in both chart and narrative form) of your proposed Partnership Kura, including:

- a) Governance;
- b) Management;
- c) Administration; and
- d) Subcontract arrangements (if applicable).

Response

### Governance

The Upper Valley Trust Board is the governance body for UVMS and will be the governance body for the Partnership Kura. As part of the agreement we have with the Villa Education Trust it is necessary for one of our trustees to also be part of the Villa Education Trust. This is to ensure the integrity of the educational model is retained. It also provides the Upper Valley Trust Board with access to the experience and knowledge of the Villa Education Trust. The Academic Manager will report directly to the Trust Board.

The current trustees are:

- Bruce Billington
- Erica Hanlon
- Ruth Harland
- Karen Poole (VET Representative)

As a Partnership Kura the Trustees will also include the Academic Manager and the Community Liaison Manager. They will be seconded to the Board in acknowledgement of their leadership roles.

We currently have three people who give advice to the Board on specific matters: A Māori kuia, a Pasfika elder, and a senior teacher in a decile one school.

The Upper Valley Trust Board, as sponsor, will be responsible for ensuring UVMS, as a Partnership Kura, delivers the agreed outcomes to the Minister. These outcomes will be in the areas of:

- Student achievement.
- Student engagement.
- Parent, family and whānau engagement.
- Financial management.
- Organisational management.

### Management

Our Office Manager, Erica Hanlon, has responsibility for the day-to-day running of UVMS and will continue to do so. She undertakes many of the administrative and support tasks necessary to enable the professional teaching staff to focus on teaching and learning. We do envisage providing additional support for her as the school role increases.

Karen Poole (Villa Education Trust) is currently the Business Manager for UVMS and is responsible for all financial management.

## Administration

The daily administration and operation of the school is the responsibility of the Office Manager and the Academic Manager. They ensure that UVMS operates smoothly and is a safe and supportive learning environment for all learners. They also have responsibility for decisions that affect our students on a daily basis. This model will continue.

Given the intended increase in roll in 2015 it will be necessary to employ personnel to undertake specific administrative tasks. These positions could be full time or part time. Members of the local community could be used on a volunteer basis to support teachers and the Community Liaison Manager where appropriate. Using parents, families and whānau to support the school operate effectively is a practical means of engaging with them. It can also provide work experience for members of the community to support their entry into employment.

Decisions around administrative roles will be the responsibility of the Office Manger reporting to the Business Manager.

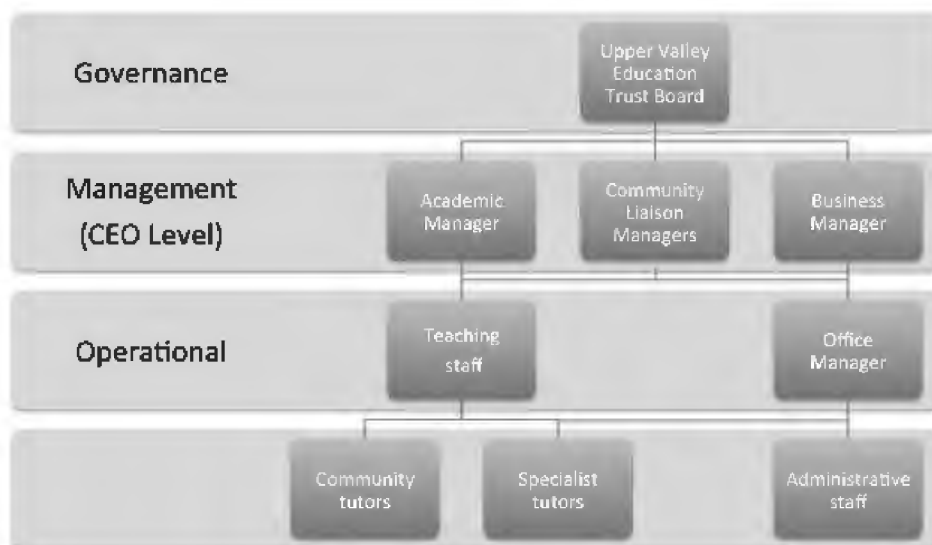
### Accountability Structure

The following figure depicts the reporting lines and accountabilities within this model.

The Academic Manager (sometimes called Lead Teacher or Principal) will have overall responsibility for both communities but will have a closer relationship with one. A senior teacher will be appointed to develop a close, leadership relationship with the second community.

These relationships will be managed through the following strategies:

- Clearly defined roles and responsibilities.
- Shared understandings around accountabilities and expectations.
- Transparent, open and honest communications within a professional community.
- Clear delineation between governance and management.
- Hierarchical structure but one based on shared understandings and values and a commitment to the school, it students and the Hutt Valley community.



### Subcontract Arrangements

Sub contracting arrangements will exist for the delivery of specialist services in areas such as music, drama and sport. We may also sub contract local organisations to deliver community-based learning programmes. All such arrangements will be co-ordinated by the Office Manager reporting to the Business Manager.

**22. Describe your proposed methods or structures to ensure teacher, parent, family/whānau and student input to decisions that affect the school.**

**Response**

UVMS currently operates an Advisory Committee whose role is to provide a communication link between the parents, the school and the Trust Board. If we are successful in this proposal we envisage reframing this as two Community Forums comprising:

- Academic Manager and/or Lead teacher.
- Community Liaison Manager.
- Office Manager.
- Up to four parent representatives (Ideally one from each year group).
- Up to two student leaders from Year 10.

The purpose of the forums will be to:

- Provide a formal channel of communication between groups from across the school community.
- Provide input to the Leadership team on the on-going development of the school.
- Comment on and discuss the overall achievement of the students.
- Provide insights into any barriers or obstacles to further enhancing learning outcomes.
- Provide feedback on the curriculum.
- Report to the Upper Valley Education Trust Board.
- Undertake special project fundraising.
- Source community support for the School

We anticipate running two Community Forums, one for each community.

Forum meetings will be held four times per year. If necessary, special meetings may be called. The timing of each meeting will be determined in consultation with the members of the Forum and to facilitate representation.

The Academic Manager will report to the Forum on curriculum and on key outcomes and progress made in the school. This will be a key medium for reporting to the wider community. The forum will not be a vehicle to raise concerns regarding individual learners. Nor will it be a forum for discussions surrounding individual teachers.

The parent and student representatives on the Forum will be expected to engage with the members of their community group prior to each meeting to ascertain whether there any particular agenda items they wish to be raised. They will also be expected to report back to their community groups. The nature of that reporting will be agreed amongst the relevant participants. In addition, they are to be available to others within their community group who have input or comments they wish to make as necessary.

**23. Provide two detailed implementation plans covering:**

- a) the period from gaining approval to the opening of the school.
- b) the period from the opening of the school to the end of the first year.

**Response**

A table outlining the implementation *and* establishment plan through to the end of 2015 has been appended (Appendix 13).

We have assumed an August 1 start for the purposes of this proposal. Should we be able to commence implementation earlier we would.



The key activities we have to undertake in 2014 include:

- Communication with our current parents about the changes to the school and what the implications are for their children.
- Communication with the Hutt Valley community regarding the new status of the school and the enrolment procedures.
- Appointing an Academic Manager and a Community Liaison Manager.
- Extending our lease and making appropriate renovations for a second community and such as the development of the *Whānau* Room.
- Developing a communication and consultation plan.
- Holding an open day at UVMS.
- Consulting with key agencies and organisations and community workers/leaders.
- Advertising for additional staff.
- Lease or purchase of a minivan if needed to provide transport for students to and from school.

**24. Complete the templates in the attached MS Excel workbook with your proposed financial forecasts. Guidance on how to complete the forecasts is provided in the spreadsheet. The worksheet covers three components**

- a) Financial forecast (budget)**
- b) Balance sheet**
- c) Student Roll**
- d) Staffing levels**

**Response**

The following are the assumptions on which our financial plan has been developed. Details of the financial planning have been included in the attached budget, which also provides the financial forecasts.

- Expenses are fairly even throughout the year after the first establishment/setup costs.
- Planning and budgeting will ensure that funding is allocated according to the time frames it covers.
- A separate Trust account will be held and portions of the funding will be transferred to this account to ensure it isn't prematurely overspent.
- Any surplus from the setup round will be put in Trust for any further renovations in the following years.

**[Applicant to confirm completion of the workbook titled "RFA PSKH Budget template.xlsx"]**

This has been included as requested. The following are the assumptions on which the forecast has been based:

- All funding is conservative.
- The model works with just Crown funding however business and other support would be actively sought to supplement income.
- Surplus money - particularly from the set up payment - may not all be used in the initial year but would be accounted for in the following years to cover the setup.
- Surplus would also be used to provide more resources, community programs, development of facilities and support networks.
- All expenses are based on the real costs associated with the operational costs of UVMS but categories have been kept broad and all-encompassing. We have detailed spreadsheets of itemised costs. The figures provided are based on real expenses.

- Supplier relationships are established and purchasing power has been maximized. Best value would continually be sought.

Salaries are calculated on near top of scale teacher. Newer teachers will be on a lower scale.

**25. Detail the amount and terms of any funding (additional to funding to be provided by the Crown) that is to be provided to the school, including:**

- a) what you propose this funding will be used to provide; and**
- b) the relationship between the school and the funder.**

**Response**

**a) What you propose this funding will be used for.**

We are confident we can effectively operate UVMS as a Partnership Kura within the Crown funding indicated. This includes providing our students with significant education outside the classroom (EOTC) opportunities, the necessary digital technologies, high quality physical learning environments (light, air, furniture etc.) and quality teachers.

However, we will actively seek additional funding and support for the school. This will enable us to further extend and enrich the learning programmes we can offer. There are a number of ways, beyond direct financial support, through which communities and organisations can support schools including the provision of professional services, the donation of digital technologies and other learning resources and the development of the property infrastructure.

We will particularly value the learning resource that is present in the community whether through the use of infrastructure or through the sharing of knowledge and expertise. Through proper use of resources such as sports facilities, parks and libraries as well as the Internet the students of UVMS currently learn in an environment without walls. Providing access to community based resources is a significant way in which the community can support the school.

**b) What the nature of the relationship between the school and the funder will be.**

The relationship will depend on the nature of the support provided. In some instances they will be educational partnerships, where we will work with the "funders" to enhance academic outcomes. In others they will be a donor/recipient relationship, where we will publically acknowledge any assistance we receive. There will also be opportunities where the relationship can be mutually beneficial where both the "funder" and UVMS receive benefit. This could include, for example, our learners donating community service time to an organisation in recognition of the use of their facilities.

**26. Outline your proposed:**

- a) financial management and internal accounting procedures for the school, including controls that will be put in place to ensure appropriate fiscal accountability;**
- b) provisions for conducting annual audits of the financial operations of the school; and**
- c) types and levels of insurance that you propose to operate the school.**

**Response**

**a) Fiscal accountability**

The Business Manager will have overall responsibility for financial management and internal accounting procedures. The Office Manager will be required to provide the Business Manager with up-to-date and accurate records for UVMS. Either the Office Manager or Academic Manager will need to authorise any expenditure.

The Board does not currently use any common industry standards. We will work with our accountants to ensure we meet Ministry requirements in all areas.

**b) Annual audits**

The accounts for UVMS will be managed and reported on by our accountants, DFK Carlton. They will conduct annual audits as required and furnish annual reports to the Trust Board through the Business Manager.

The Business Manager will report to the Minister against all required targets and standards.

**c) Insurance**

We carry all the standard liability and business interruption insurances necessary for a school. Both the business and our premises are insured.

All insurance policies and levels are reviewed with our accountants and insurers (Bay Insurance Brokers Limited).

We are happy to provide further detail if required.

**27. Outline your proposed facilities, including:**

- a) the type of property arrangement and the terms of the tenancy (if applicable);
- b) how this site would be a suitable facility for the proposed school, including any plans to renovate; or
- c) if a site has not been identified, your present options for the school site, including a timetable for identifying and acquiring or leasing a facility;
- d) your financing plans for acquisition and renovation of a facility; and
- e) describe plans for expanding school facilities matching your projected roll numbers, including how you will attract additional staff and acquire other resources needed to serve a larger student body.

**Response**

UVMS is currently located upstairs in *The Stables* and is part of the Lane Park complex in central Upper Hutt. *The Stables* has been fitted out for the school and rooms include a science room, an art room, ample teaching spaces, a kitchen, and areas set aside for quiet individual and small group learning. The character of the building ensures that UMVS is a welcoming and comfortable learning environment with none of the "institutional" feel of many schools. The floor plans for the UVMS are appended. (Appendix 9).



The following is a quote from a recent ERO report regarding the suitability of the property.

***Students learn in a suitable building. The trust board leases the premises, which include three teaching spaces, administration offices and some smaller areas for individual study and technology. The outdoor space includes grassed and asphalt areas and vegetable gardens. The indoor spaces have been refurbished to meet the purpose and requirements of the school.***

APPLICANT NAME: [UPPER VALLEY EDUCATION TRUST]

The Board leases the property from the landlord, the Christian Fellowship Upper Hutt. The term of the lease is [REDACTED] We currently lease all of the first floor and part of the ground floor. [REDACTED]

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

We have the guaranteed use of five designated car parks, plus the use of the whole parking area unless required by Christian Fellowship Upper Hutt for rare special events. This provides us with ample outside space when the grounds are too muddy. We also have the use of the surrounding grassed area adjacent to the Stables Building, a very large area, ideal for sports, and the use of three community gardens. In wet weather we have the use of a large warehouse at the back of the Lane Park Complex.

It is our intention to extend our lease to include sufficient rooms, and parking spaces, for the two communities. There are a number of rooms available in the main Lane Park building, a very large building in front of the Stables. [REDACTED]

The current lease agreement is appended (Appendix 10). [REDACTED]

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

**a) If a permanent site has been identified how this site would provide a suitable facility for the proposed school including any plans to renovate, or**

No major renovations to the current school are required should it become a Partnership Kura. The changes that are required include:

- Increasing the area rented on the ground floor to include an extra room to be converted into the *whānau* room.
- Converting the warehouse we currently use for play on wet days into a more versatile gym. At the moment we are limited in what we can use the warehouse for.
- Improving our outdoor physical education facilities with the addition of a confidence course to the playing fields and basketball hoops in the parking area. Addition of a staffroom.

However, the area currently leased will only suit one of the proposed communities and another area is being looked at for the second community. [REDACTED]

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

**b) If a permanent site has not been identified your present options for the school site including a timetable for identifying and acquiring a facility**

At this stage we are confident that we will be able to operate both communities at 16-22 Lane St. However, discussions are far enough advanced that we will have ample time to search for a new property if need be. [REDACTED]

For building timetable see Appendix 13. [REDACTED]

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

**If proposing to convert an existing public school what renovations are planned and whether any capital improvements will be required.**

*Not applicable*

**c) Your financing plans for acquisition and renovation of a facility.**

The costs of the renovations planned for the Stables, and the new community space, will not be exorbitant and an estimation has been included in our financial plans.

**28. Explain your proposed strategies for asset management and maintenance of your proposed facility, including assurance processes that ensure applicable codes and standards are maintained for the term of the Agreement.**

**Response**

The Business Manager, with the support of the Office Manager, is responsible for maintaining all necessary records, ensuring relevant inspections are undertaken as required and that all buildings and grounds are safe. This includes keeping accurate and up-to-date records of all assets and ensuring timely and regular maintenance is undertaken.

The following information has been taken from our property management policy. For a full list of current UVMS policies see Appendix 8.

**Purpose:**

1. To provide a safe working and learning environment.
2. To comply with legislation concerning occupational health and safety.
3. To facilitate appropriate long-term maintenance of all property, plant and equipment.
4. To prepare an annual statement on achievements towards addressing long-term maintenance schedules.
5. To ensure on-going preventative maintenance is provided for.

**Guidelines**

1. The Business Manager has clear property management terms of reference and protocols.
2. The annual budget will provide for on-going maintenance to existing plant, equipment and property.
3. A long-term maintenance plan is provided and updated annually.
4. A programme of preventative maintenance, including checklists is prepared and reviewed annually.
5. The school will comply with all requirements for health and safety, including where appropriate, local body regulations.

## 8 OPERATIONS PLAN

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### 29. Explain how the school will:

#### a) achieve the enrolment target you have projected in Q2.(v);

##### Response

The school will achieve the enrolment target we have projected through a number of promotional and communication activities including:

- The ongoing support of the community leaders and workers we currently have relationships with
- Extending our relationship base to include others from amongst the Māori and Pasifika communities
- The work of our Community Liaison Manager both with existing and potential partners, learners, families and whānau.
- Parent information meetings in local primary schools; the focus will be on Maoribank, Trentham, the Stokes Valley primary schools, Pomare, Taita Central and Naenae primary schools.
- Public Meetings; some held on marae and/or in community houses
- Advertising in local newspapers
- School Information Evenings at UVMS
- The success of UVMS to date and the positive reputation of the school within the community

We will ensure that UVMS is highly visible, that our aspirations for the local community are clearly expressed and disseminated. We will be available to answer any queries from across the community. We will also undertake to work with community groups and leaders where particular families or groups of learners have been identified as needing the opportunities we can offer.

#### b) be publicised throughout the community, including any specific outreach activities or similar;

##### Response

Our Community Liaison Manager will be central to our outreach to the wider Hutt Valley community. This person will be responsible for ensuring the school has a "face" in the community, someone who is readily accessible to them. He or she will be proactive in their approach; waiting for the community to come to them will not work. The Community Liaison Manager will start by working with the people we already have a relationship with, and connecting with the families identified as benefiting from coming to our school.

We do not see the initial promotional activities undertaken in 2014 ceasing once UVMS becomes a Partnership Kura. We will continue to use a range of methods to publicise the school in the priority learners' communities and to promote the achievements of our learners. These will include the school website, local newspapers and other community leaflets. We will also ensure we are visible at community events wherever appropriate. We will be open to the use of a range of media and communication channels. Our communication strategy, developed in 2015, will continue to be reviewed and amended where necessary and as new opportunities become apparent. This will be the responsibility of the Community Liaison Manager working with the Academic Manager.

Our students and our professional staff will continue to be highly visible through the community based learning and community service modules in the afternoon programmes. As discussed earlier, in the afternoon programmes, the community becomes an extension of the school. The best publicity we have is satisfied/enthusiastic school whānau and highly confident, connected and well behaved learners out in the community.

**c) target parents/family/whānau who may not be engaged in their child's learning;**

**Response**

Targeting these families will be a key function of the Community Liaison Manager. As mentioned previously they will work with:

- community workers/leaders
- primary schools and primary school teachers
- other families
- local organisations and community service agencies

to identify parents, families and whānau who might not otherwise come forward.

How the identified families are approached will be determined on a case-by-case basis but we will be respectful of their *mana*. Where appropriate we will approach families through our community contacts, people they already trust. It is anticipated that overtime the community itself will work with other parents, will recommend the school and support other whānau in coming forward.

**d) identify and develop relationships with community organisations that can assist in marketing with parents/family/whānau; and**

**Response**

We already have significant links with community organisations in Upper Hutt. These community workers and leaders are keen to see another educational option to help all their young people succeed. They will work with us to ensure a high number of priority learner applicants. (Appendix 5).

As soon as they are appointed the Community Liaison Manager and Academic Manager will extend our current database of all local community organisations and contact people and will fill any gaps not already covered. The process of deepening relationships and finding ways to engage parents, families and whānau will be ongoing. We will make it clear that we see the relationship as a partnership, as a way of working together to maximise our individual strengths and capabilities.

Organisations and groups we currently have relationships with fall into the following categories:

- Marae (Orongomai in Upper Hutt who have links with other marae in the target area and with other Māori social service providers).
- Groups working with at-risk families and young people such as The Prison Fellowship Family Worker, the Community Development Facilitator, and various church-based community and youth workers.
- Local community centres/houses (we have established connections with Timberlea and Trentham and have indirect associations with Pomare, Taita and Naenae).
- Local Māori and Pasifika leaders.

We have informal relationships with some of the primary schools with large numbers of low decile students but, because of concerns in respect to possible union opposition, we cannot ask them for any written commitment for support at this stage. We are confident Principals and staff will be happy to allow us to make presentations to their parent community if and when we become a Partnership Kura, and that they will introduce us to some of the most needy families. Some staff have already shared with us, in private conversation, their concerns at how many of their students do not do well in post-primary education.

One area we are working to extend is relationships with churches, in the target area, with large Pasifika and Māori congregations.

**e) if proposing to convert an existing school, the nature and medium to advise the community of the proposed conversion.**

**Response**

An initial task for the Board will be to develop a communications plan, which will include the key message we want conveyed to the public and the best way to achieve this.

We will ensure the conversion of the school is widely publicised in the Hutt Valley and that it is seen as an exciting opportunity for both the school and the local community. The message will be that this conversion to a Partnership Kura has enabled the Trust Board to attain its vision of meeting the needs of a wide range of learners in the Hutt Valley.

We will look at getting articles and stories into local publications such as the Upper Hutt Leader, the Vibrant Hutt and the Hutt News. We will print flyers, which we will send out to relevant organisations and place in key public locations. We will also promote the change through the school website. Equally importantly we will use our networks and "word of mouth" to spread the messages.

We are aware of the need to talk directly with current parents and to discuss any concerns they may have regarding the change. We are confident they will be supportive of this move but will ensure they learn of it before it is widely publicised.

**30. Outline your enrolment policy and describe your proposed timeline for enrolling students for the 2015 school year.**

**Response**

We are fully supportive of the directive that all those who want their children to attend a Partnership Kura have an equal opportunity to do so. We also understand and support the need to target priority learners. An independent body will be employed by the Trust Board to oversee and audit all enrolments with particular reference to any ballots that are needed.

Bearing in mind the requirement that we do not select students based on backgrounds, abilities or interests the following are the broad guidelines of our enrolment policy:

- We will prioritise students from the target area within the Hutt Valley community to ensure we are reaching the target priority learners. International students and students from outside these areas will be offered places only if there are vacancies once the local community applications have closed.
- If we are not attracting sufficient applications from priority learners we will work closely with the Hutt Valley community to raise the profile of the school and increase interest in the most needy areas. We will monitor applications as part of our on-going review of our engagement with the community.
- If oversubscribed, priority will be given to siblings of current or past students unless there is a sound, evidence based reason not to do so. Any exclusion would need to be approved by the Trust Board and the independent body responsible for enrolments.
- We will accept applications until a given date. If applications exceed positions available on that date we will then operate a ballot system to determine who will be offered a place at UVMS. It is anticipated that this date will be September 1<sup>st</sup> of each year from 2015 on. Beyond that date we will accept applications on a first in first served basis until positions are full.
- In exceptional cases we may directly offer places to individual learners from the priority learners group. This would occur only where local community organisations have asked us to support a particular family or learner due to special circumstances. Any such request would be sent to the independent enrolment body and the Trust Board for approval.
- We would only exclude learners if there was evidence that their inclusion would have a severe negative impact on other learners safety and their ability to learn. Again such exclusions would need the approval of the independent body and the Trust Board.



For 2015 we will operate a two-tier enrolment process. Initial applications will close on October 1<sup>st</sup>, 2014. If applications have not reached maximum enrolment numbers we will extend the closing date to November 1<sup>st</sup>, 2014. After that date we will operate a first in first served system for any additional vacancies. If applications have exceeded places on October 1 we will close enrolments for that year and operate a ballot. We will maintain a waiting list and notify families should places become available.

Our Community Liaison Manager and the Office Manager will be available to support parents and whānau complete application forms. In the first instance, these will be kept as simple as possible. We do not want to frighten potential families because our enrolment procedures are complex and difficult to follow. A simple expression of their desire to enrol their learner and the relevant contact and demographic details are all we will require. Further information can be collected once a place is offered and again support in completing any forms will be respectfully offered.

**31. Outline the suspension, expulsion and other disciplinary policies and procedures of the proposed school, and the criteria for making decisions on such matters, demonstrating how these align with the terms of the Education Act 1989, Section 158V and the Ministry of Education's Stand-downs, Suspensions, Exclusions And Expulsions Guidelines.**

**Response**

All policies and procedures will be in accordance with the terms of the Education Amendment Bill and other Ministry guidelines. The following guidelines have been taken from the UVMS policy on suspension and adapted slightly to include the role of Community Liaison Manager.

The underlying principle is that suspension and expulsion should be the last resort, and only when there is danger to other students or staff. Where the learning of others is jeopardised we will remove the privileges of attending all classes and activities. The student involved will work independently and under supervision on the same programme as their classmates. This will continue until the Academic Manager is satisfied that the student is ready to return to the classroom.

The Community Liaison Manager will become involved if there is concern that a student's circumstances outside school are influencing their behaviour. If necessary, we will work closely with community agencies and other organisations to provide alternatives and to support learners, their parents, families and whānau.

Current guidelines for suspending students:

1. The school will take all reasonable steps to modify a student's behaviour before resorting to suspension.
2. The students' files will document behaviour patterns. This will include actions taken.
3. Full advice and guidance will be available to all students.
4. The best interests of all students will be considered in the final decision-making.
5. The Academic Manager has the power to suspend students without referral to the Board.
6. For potential indefinite suspension a Board disciplinary sub-committee will be convened.
7. Clear procedures will be established for handling suspension. These procedures will:
  - Meet legal requirements.
  - Specify records to be made and arrangements for storage of records.
  - Indicate the people/agencies to be notified.
8. Procedures will follow the appropriate Ministry of Education guidelines and requirements.
9. Families will be notified as soon as possible of the suspension and of its implications.

Guidance and advice is available throughout the whole process

**32. List in a table the names and qualifications of persons who will hold key leadership roles in the school. Provide CVs (or position descriptions for positions which will need to be recruited) as an appendix to your Application.**

**Response**

A brief curriculum vitae for the Business Manager has been appended (Appendix 12). Position descriptions for other senior roles, all of which will need to be recruited, have also been appended. (Appendix 11).

<b>Leadership Role</b>	<b>Qualifications</b>
UVMS Academic Manager	<ul style="list-style-type: none"> <li>• Registered teacher.</li> <li>• Experienced teacher with leadership experience.</li> <li>• Knowledge of recent research.</li> <li>• Commitment to the school's educational model and philosophies.</li> <li>• Commitment to raising achievement for priority learners.</li> <li>• Commitment to on-going professional learning and personal growth.</li> </ul>
Community Liaison Manager	<ul style="list-style-type: none"> <li>• Commitment to the school's educational model and philosophies.</li> <li>• Knowledge of the local community.</li> <li>• Already established networks with local organisations and agencies.</li> <li>• Commitment to the economic and social well being of the children in the Hutt Valley.</li> <li>• Understanding of the importance of education and life-long learning.</li> <li>• Strong interpersonal skills.</li> <li>• Excellent communication skills – both oral and written.</li> <li>• Knowledge of the language of at least one of the priority groups.</li> </ul>
Office Manager	<ul style="list-style-type: none"> <li>• Commitment to the school's educational model and philosophies.</li> <li>• High level of computer skills using the Office Suite.</li> <li>• Strong interpersonal skills and able to develop positive relationships across the school community.</li> <li>• Professional manner and appearance.</li> <li>• Willing to take responsibility and show initiative.</li> </ul>

**33. Outline the process that will be used in the recruitment of teachers, administrators, and other school staff.**

**Response**

Appendix 13 outlines the staffing implementation plan.

All positions will be advertised in the following ways:

- Advertisements placed in the Education Gazette and local newspapers
- Community workers and leaders notified of the advertisements and asked to recommend that any suitable applicants apply

The Board, with the assistance of the Villa Education Trust Board will screen and interview suitable applicants. Once the Academic Manager is appointed she or he will have an important role in interviewing and choosing subsequent staff.

**34. Detail the professional backgrounds, depth of experience and personal qualities that you will seek in teachers and other school staff.**

**Response**

All staff employed by the Upper Valley Education Trust Board will be expected to act according to the highest standards of professionalism at all times and in ways that are consistent with the values, philosophies, aims and objectives of the Trust Board. This includes professional dress and behaviour. They will be expected to undertake professional development opportunities as required and to pursue their own professional learning through informal and formal opportunities.

Quality teaching will be central to the success of UVMS in raising achievement for priority learners. We will employ teachers whose philosophies and values align with the Christian principles on which the Villa Education Trust model is based. They will share an understanding of the importance of *ako* as an underlying principle and will be able to offer practical examples of how they would integrate this into their practices.

Our Academic Manager is expected to teach and to act as mentor and guide for less experienced staff. The appointment of an Office Manager and the role of the Business Manager ensures that this person will have time to provide the necessary professional and academic leadership for the school. They will also have time to develop relationships with the students under their care, their parents, families and whānau.

The personal attributes we would look for in our teaching staff include:

- A love of teaching and learning.
- An understanding of its importance for the economic and social wellbeing of our young people.
- An inquiring mind and a desire to continually reflect on and improve their own practice.
- A commitment to the Villa educational model and philosophies.
- A commitment to priority learners and the Upper Hutt communities.
- An understanding of diverse cultures and a desire to learn more about the languages, identities and cultures of the learners in their care.
- Pedagogical content knowledge appropriate for their levels of experience.

**35. Outline the processes that will be used to achieve the desired quality of staff and controls you will apply to ensure that background checks, including Police vetting, are conducted on all school personnel, including volunteers and contractors, prior to the beginning of their employment or service.**

**Response**

A detailed individual employment agreement and employment policies and procedures are in place for UVMS (for a full list of current UVMS policies see Appendix 8). These will be retained. The basic employment process is:

- Position advertised.
- Prospective applicants are sent background information and an application form to send in with their CV and letter.
- Analysis of applications and short list made.
- Interviews.
- Check teacher registration details.
- Appointment made.
- Application process completed.

All those employed who are not registered teachers will be vetted using the New Zealand Police Licensing and Vetting Service Centre. This must be obtained before all staff and contractors have, or are likely to have unsupervised access to students or children.

**36. Outline your proposed key policies regarding salaries, contracts, hiring and dismissal, evaluation of staff, benefit plans, and other matters related to staffing.**

**Response**

The UVMS employment policies and procedures manual will be reviewed and adapted as part of the implementation processes. There are a number of policies associated with employment.

Some key points include:

- **Contracts** - Individual employment contracts will be negotiated with the Trust Board through the Academic Manager and the Business Manager.
- **Remuneration** - In general terms staff will be paid above the award. Factors considered when determining appropriate remuneration levels will include responsibilities within the school, contact time, qualifications and experience.
- **Hiring** - The appointments policy (Appendix 14) describes the purpose and guidelines for hiring staff.
- **Dismissal** - There are clearly stated grounds for the dismissal of staff or the termination of contracts. These are laid out in the individual employment contracts and include serious misconduct, repeated misconduct, gross negligence and being charged with criminal offences. The agreement may also be terminated if through sickness or injury an employee is unable to perform their duties over an extended period of time.
- **Evaluation of staff** – The performance management policy (Appendix 15) describes the rationale and guidelines for staff appraisal

**37. Outline how your approach to teacher assessment and appraisal will contribute to a culture of continuous development within the school.**

**Response**

UVMS has a detailed staff appraisal and development plan. The areas currently considered in the appraisal document will be reviewed in light of the Measurable Gains Framework and what we know is needed to raise the achievement of the priority learners.

Guidelines related to staff appraisal processes include:

- The Academic Manager will be responsible for appraising all professional staff.
- The Office Manager/s will be appraised by the Business Manager.
- The Academic Manager, Community Liaison Manager and Business Manager will be appraised by the Trust Board.

Questions teachers are asked during the appraisal process include:

- What aspects of teaching/working at UVMS are you finding worthwhile?
- What would be some ways of further enhancing these worthwhile areas?
- What aspects of teaching/working at UVMS are you finding difficult?
- What would be some ways of overcoming these difficulties?
- What aspects of your job do you consider that you are doing well?
- What aspects of your job do you consider that you need to focus on for improvement?
- Are there any specific resources you believe that you need to allow you to do your job better and/or for the school to operate more effectively?
- What other opportunities/responsibilities would you be interested in while at the school?
- What professional goals do you have and how can the school support you in achieving these?

**38. If you propose to use volunteers and/or contractors, outline:**

- a) the roles (where not disclosed in section 10(v) of this form);**

**b) how they will be identified, vetted and trained.**

**Response**

**a) The possible roles**

Contactors will be used to deliver portions of the afternoon programmes where specialist skills, knowledge and resources will significantly enrich the learning opportunities provided. These will include cultural activities, dance and drama.

Volunteers will be used within the school in a range of ways dependent on the expertise available in the community. Support with fundraising and resource development are among the “usual” activities for parent and community volunteers. Members of the community are also valuable learning resources themselves. Often there is unrecognised experience, knowledge and skills in the wider community that can be used to enhance student learning; we aim to utilise this. Examples could include teaching Māori or Pasifika languages in an authentic context, learning about other cultures or local history. Volunteers could also be used to teach art techniques or dance. Community members may be experts in a particular technology. Our Community Liaison Manager will work to extend our current database of “talent” that is available to the school.

The Community Liaison Manager and Academic Manager will work together to identify and utilise the range of talents that volunteers can bring to a school. Their use will be one way in which the school can demonstrate that we value and accept the cultures, languages and identities in the community. Encouraging and supporting community members to provide support is also a practical way of engaging with the community, of clearly showing we are genuine in our desire to work together to raise achievement for their children.

**b) How they will be identified, vetted and trained.**

Volunteers and contractors will be identified through our community and other networks. As indicated above, all those who will have unsupervised contact with UVMS pupils will be required to undergo police vetting. Those who will be working with professional staff will be vetted more informally through reference checks in the local community. We would not utilise volunteers or contractors without some form of personal reference from a trustworthy and known source.

**39. Outline how the school proposes to meet and maintain the required health and safety standards.**

**Response**

The UVMS health and safety policy will be reviewed and amended where necessary. The final policy document will adhere to Ministry guidelines and other health and safety standards.

The Business Manager working with the Office Manager will be responsible for ensuring all health and safety requirements are met, that the necessary procedures are in place and that satisfactory records are kept.

The guidelines from the UVMS policy are to:

1. Provide employees with basic health and safety rules.
2. Advise employees of hazards in their work and how to avoid or deal with these hazards.
3. Provide employees with information on the safe storage and handling of chemicals.
4. Record and investigate all injuries occurring in the workplace.
5. Provide an effective emergency evacuation procedure to cope with all likely emergencies.
6. Carry out regular inspections to identify potential health hazards and take all reasonable steps to remove or reduce them.
7. Provide sufficient training in the use of equipment or machinery.
8. An accident register will be maintained detailing accidents to both staff and students.
9. The Business Manager will report to the Board any accident involving serious injury which occurs in the school or during an off-site school activity.

## 9 Acceptance of Draft Agreement

We can confirm our acceptance of the Draft Agreement. We have also consulted with South Auckland Middle School staff who tell us this is the same as the agreement that they are working with, they have not found any problems with it to date. This builds our confidence in it.

The Crown's commercial position is reflected in the draft Agreement attached as Schedule 1 to this RFA (the Draft Agreement).

Each Applicant is asked to confirm its acceptance of the Draft Agreement. If you would not be prepared to enter into the Draft Agreement in the form attached, please include in your proposal the amendments you consider are required to the form of contract and the reasons you are requesting them, propose an alternative position that would protect the interests of both parties and confirm that all the other clauses in the agreement are acceptable.

Clause number	Detailed explanation of why the clause is unacceptable	Proposed new position that protects the interests of both parties

The Crown will, in its absolute discretion, take such proposed amendments into account during the evaluation process, but the Minister is under no obligation to accept any such proposed amendments.

Should an Applicant be selected to proceed to contract negotiations, **only those provisions identified** as requiring amendment in the Application and any entirely new provisions that the Minister may introduce as forming part of the final Contract can be the subject of contract negotiations. Any attempt by any Applicant to raise new or different issues may result in the Minister terminating contract negotiations with that Applicant.

## 10 Assumptions, Risks and Caveats

Following is a table of the Assumptions, Risks and Caveats for this proposal. We have noted the major risks, however, we believe the model we are proposing will mitigate these risks, as noted below. The only assumptions have been financial, see also Section 7-24. There are no caveats to this proposal.

Reference	Type (A/R/C)	Subject	Comment
1	Risk	Community engagement	<p><i>The community will not engage with the Villas and we will not be able to attract desired learners.</i></p> <p>The commitment of a number of community workers and leaders to connecting us with priority learners makes this unlikely.</p> <p>Our appointment of a Community Liaison Manager will further mitigate against this.</p>
2	Risk	Student engagement	<p><i>Students will not adapt to the educational model we present and will not become engaged, connected learners.</i></p> <p>The evidence we have from Mt Hobson Middle School, and our own experiences, convince us that our model will work for all learners.</p>
3	Risk	Professional staff	<p><i>We will not be able to employ sufficiently qualified staff for the Villas.</i></p> <p>The Villa model provides teachers with a positive environment within which to work. Having an Office Manager and a Business Manager means that teachers can focus on delivering the curriculum and engaging their learners. Our class sizes are small. Our salaries are competitive and the rich curriculum offers teachers a wide range of pedagogical opportunities.</p>
4	Risk	Financial Viability	<p><i>The School will not be able to be operated within the budgets provided.</i></p> <p>Based on our experiences at UVMS we are confident that we can operate the school within Crown Funding. We will work to raise further support enabling us to enrich the curriculum further.</p>
5.	Assumptions	Financial	<p><i>That the level of Crown funding will be as indicated in the proposal.</i></p> <p><i>That funding left over from the initial set-up can be used in the following years as we expand.</i></p>

# 11 Applicant Declaration

Each Applicant is required to complete the following Declaration. For joint or consortium Applications each party must complete a separate Declaration.

Topic	Requirement	Applicant's declaration
RFA response:	The Applicant has prepared this application independently to operate a Partnership Kura.	agree
RFA terms:	The Applicant has read and fully understands this RFA, and the RFA terms in Part Three of this RFA, and agrees to be bound by them.	agree
Collection of further information:	The Applicant authorises the evaluators to:  collect any information about the Applicant, from any relevant third party, including a referee, or previous or existing client  to use such information in the evaluation of the Applicant's Application.	agree
Objectives and Requirements:	The Applicant has read and fully understands the nature and extent of what is required by the Ministry and the Minister as described in parts one and two of this RFA.  The Applicant has the necessary capacity and capability to fully meet or exceed the deliverables in the operation of a Partnership Kura and will be available to operate their Partnership Kura throughout the proposed contract period.	agree
Contract terms and conditions:	The Applicant has read and fully understands and accepts the Agreement terms and conditions as stated in the proposed conditions of contract or has completed the table of proposed contract derogations in the form set out in paragraph 8 of this Part Three of the RFA. If successful, the Applicant agrees to sign a contract based on these terms and conditions.	agree
Conflict of interest:	The Applicant warrants that it has no actual, potential or perceived conflict of interest in submitting this Application, or entering into a contract to operate a Partnership Kura. Where a conflict of interest arises during the RFA process the Applicant will report it immediately to the Contact Person.	agree



PART 2 - APPLICATION FORM

APPLICANT NAME: [UPPER VALLEY EDUCATION TRUST]

<p>Ethics:</p>	<p>The Applicant warrants that in submitting this Application it has not:</p> <p>entered into any improper, illegal, collusive or anti-competitive arrangements with any competitor</p> <p>directly or indirectly, approached any representative of the Minister, Ministry or the Board to lobby or solicit information in relation to the RFA (except where allowed for during the Clarification period).</p> <p>has not attempted to influence, or provide any form of personal inducement, reward or benefit to any representative of the Minister, Ministry or the Board.</p>	<p>agree</p>
<p>Offer validity period:</p>	<p>The Applicant confirms that this Application remains open for acceptance for a period of 180 days from the Closing Date.</p>	<p>agree</p>
<p>Applicant interview</p>	<p>The Applicant acknowledges that if requested, the Applicant will be available to attend an interview in Wellington at a location to be determined by the Board over a one week period, with time slots given on a first-in first-served basis.</p>	<p>agree</p>
<p>Publication of Application details</p>	<p>The Applicant accepts that, due to public interest associated to this Application process, it is intended that the submitted application will be made publicly available on the Ministry of Education website, subject to any deletions that would be justified if the information had been requested under the Official Information Act 1982.</p>	<p>agree</p>
<p>Declaration:</p>	<p>The Applicant declares that in preparing this Application it:</p> <p>has provided complete and accurate information in all parts of the Application, in all material respects</p> <p>has secured all appropriate authorisations to submit this Application and is not aware of any impediments to its ability to enter into a formal contract to deliver the outcomes.</p> <p>The Applicant understands that should it be successful in being awarded a contract with the Crown then the falsification of information, supplying misleading information or the suppression of material information in relation to this RFA will be grounds for termination of the contract.</p>	<p>agree</p>
<p><b>DECLARATION</b></p>		

PART 2 - APPLICATION FORM

APPLICANT NAME: [UPPER VALLEY EDUCATION TRUST]

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This Application has been approved, and is signed by, a representative of the Applicant who has the authority to do so. This representative is named below.

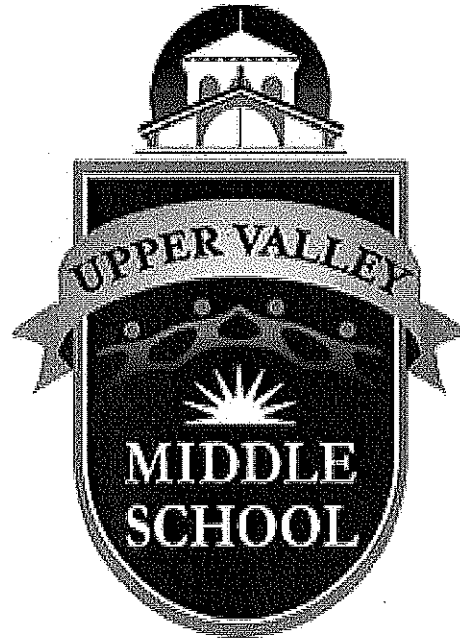
This representative declares that the particulars provided above and in the attached Application documents are accurate, true and correct.

Signature:	
Full name:	Ruth Harland
Title / position:	Chairman, Upper Valley Education Trust Board
Date:	10 March 2014

## 12 Applicant Check List

The checklist is included for your reference only.

Action Required	Done	
1. Submit the Intent to Respond Notification (refer separate document) to <a href="mailto:partnership.schools@minedu.govt.nz">partnership.schools@minedu.govt.nz</a> by 5:00 PM Wednesday 22 January 2014	✓	
2. Submit all questions requiring clarification (if required) by 5:00pm, Wednesday 26 February 2014	✓	
3. Complete all required sections of the application.		
4. Submit your CD Rom / memory stick and paper copies of the following documents by 12:00 (Noon) Tuesday 11th March 2014		
	Nine paper copies of your Application in a Word format (with at least one copy unbound and/or stapled)	
	One paper copy of the Excel spreadsheet containing your commercial information/financial details	
	One CD Rom or memory stick containing an electronic copy of all of the sections of your application	



Appendices to Proposal  
for  
Partnership Schools/ Kura Hourua

Prepared for Ministry of Education

By Upper Valley Trust Board

March 2014



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## APPENDIX 1: PROJECT INFORMATION

The following table is an overview of the integrated curriculum including the project topics and the curriculum areas they specifically relate to, in 2014.

Base	Year 7	Year 8	Year 9	Year 10
English	Great Books	Poetry	New Zealand Writing	Shakespeare at the Globe
Mathematics	Architecture	The Human Circus	Flight and Space	Statistics & Lies
Learning Languages	A Language & Culture	Language of Music or Movement	Maori or Pacific Island Language and Culture	Advanced Language or Book or Author
Science 1	Plants	Human Beings	War	Reactions
Art & Culture	An Artist or An Era	An Ancient Culture	Archaeology or Anthropology	Film or Director or Genre
Technology & Business	Production & Inventions of the Past	Change through Technology	Production of the Present and Future	Business in Action
Social Studies (History & Geography)	New Zealand: Places and People	The Oceans	A People or Country or Time	Law and Culture
Science 2	Animals	Great Scientists	Sport	Machines



## PROJECT TASK SHEET

Following is an example of the task sheet that is given to a student for each project

**TITLE:** LIES & STATISTICS (YEAR 10 P2)

**Due Date:** Friday 19<sup>th</sup> of April

**Purpose Statement:** To show an understanding of how statistics are used in modern society.

**Areas to Cover:**

**Mathematics:** Number.

- a) Create a list of things that are measured statistically in our society.
- b) Prepare and present a table showing some of these statistics, grouping items that are related.

Measurement. Create and detail a method of estimating how many cars pass down a segment of River Road or Fergusson Drive in a specified time period.

Algebra. "Probability" is a key part of statistics - work out a set of probabilities for the game of Roulette (or another chosen game of chance).

Algebra. Describe in words how the figure for "life expectancy at birth" is calculated.

**English:**

Writing. 1) Research and then describe, with evidence as support, why life expectancy in a country like New Zealand has gone from 40 years to approx. 80 years over the last century.

2) Write a script for an advertisement that exploits statistics to attempt to sell a product.

Viewing. Watch and critically review a news programme from a use of statistics perspective. NB: You are expected to fully support any statements you make.

**Science:**

Living World. Investigate and use a detailed diagram (with descriptions) to classify the living world at microscopic level.

Material World. Research and create a table and an appropriate graph showing the amounts of H<sub>2</sub>O on the earth in its various forms.

Planet Earth and Beyond. Create a table of environmental statistics, establish their credibility and comment on their implications.

**The Arts:**

Music: Developing Practical Knowledge and Developing Ideas. Design, detail and carry out a test that helps you to establish the best music to play while studying (if any). State and attempt to explain your results.



**Social Studies:** Task 1. Gather data and then write a paragraph to comment on how New Zealand is doing “economically” compared to 5 years ago? Include your data

in the form of tables.

Task 2. For some of your supporting data make two interpretations - one from a Labour Party perspective and one from a National Party perspective. These should be in paragraph form.

**Technology:** Technological Practice. 1) Use a spreadsheet to create a graph of exchange rate data for a 1 month period.

2) Create a one page questionnaire that could be used to build a personal profile of a person.

**Health & P.E.** Physical Health & Development. Gather examples of “health statistics” used to sell exercise products and identify any “lies”.

Relationships with Other People. Find and discuss the significance of statistics about family life in New Zealand.

Healthy Communities and Environments. Create a list of exercise options for people and state/promote their benefits (this could be as a pamphlet).

**For this project choose 16 tasks to complete.**





**Basic Levels Needed: You should be able to show that you can do the following:**

**Mathematics:** Make sensible estimates and check if the results are reasonable.

Design and use a statistical process for estimation.

Generate a pattern from observing behaviour of an object/game.

Interpret data and show understanding as to how it is obtained and influenced.

**English:** Thoughtfully describe events illustrated by statistical changes.

Clearly present an review of a television programme.

**Science:** Investigate and present findings on a natural phenomena.

Describe how substances can exist in different states.

Research, present and interpret scientific data.

**The Arts:** Compare and identify musical styles.

**Social Studies:** Interpret and comment upon statistical data based on the social and economic lives of people.

**Technology:** Effectively use a piece of information technology software to process statistical data.

Appropriately design a survey to gather specified data.

**Health & P.E.** Discover, use and critique statistics used in health issues.

**Scope and Depth of Content:** Apply the lessons you learned from the last project. Plan first and start early. Please ask for all of the help that you need – firstly in understanding what you have to do – and then with planning and doing your project.

**Presentation:** You can present you final project in the way(s) that you think is most appropriate for the type of things you are doing. Plan carefully and keep your project diary up to date.

Before you hand the project in ask yourself – have I achieved the purpose statement?



## APPENDIX 2: 2012 NCEA RESULTS FOR HUTT VALLEY SECONDARY SCHOOLS

The following tables summarise the NCEA results for the four state secondary schools in the areas we hope to serve as a PSKH school. The deciles of these schools vary:

- NaeNae College – Decile 2
- Taita College – Decile 3
- Heretaunga College – Decile 6
- Upper Hutt College – Decile 7

The first three tables indicate the percentage of participants who succeeded at each level during 2012. These results are broken into ethnicity and gender. They compare each of these groups by school. They suggest varying success across the schools. *Note: The 2013 results have not yet been released.*

What these data do not show is the percentage of all students at the school who have achieved at each level. This is indicated in the second group of tables.

TABLE 1: YEAR 11 NCEA LEVEL 1 PASSES - 2012

		Upper Hutt	Heretaunga	Taita	NaeNae
NZ Maori	Male	53.8	33.3	73.3	30.0
	Female	81.0	57.1	71.4	50.0
NZ European	Male	70.7	50.0	100.0	81.0
	Female	90.2	70.7	62.5	57.1
Pasifika Peoples	Male	66.7	40.0	85.7	28.6
	Female	71.4	50.0	90.0	12.5

TABLE 2: YEAR 12 NCEA LEVEL 2 PASSES

		Upper Hutt	Heretaunga	Taita	NaeNae
NZ Maori	Male	81.8	54.5	33.3	44.4
	Female	84.2	57.1	76.9	53.8
NZ European	Male	69.5	68.0	70.0	40.0
	Female	84.8	82.2	81.8	82.4
Pasifika Peoples	Male	50.0	-	50.0	63.6
	Female	80.0	50.0	58.3	68.8

TABLE 3: YEAR 13 NCEA LEVEL 3 PASSES

		Upper Hutt	Heretaunga	Taita	NaeNae
NZ Maori	Male	41.7	100	80	-
	Female	75.0	50	100	57.1
NZ European	Male	78.3	71.4	70	71.4
	Female	78.5	81.3	100	100
Pasifika Peoples	Male	100	-	100	16.7
	Female	75.0	100	90	30.8



The following tables depict the number of students who succeeded at each NCEA Level by year level. The total number of students enrolled in each year level is also given. As these data show the percentage of passes by roll tends to be lower. They also show how many students are taking more than one year to achieve success.

**TABLE 4: NAENAE COLLEGE 2012 RESULTS**

	<b>Year 11</b> (n=147)	<b>Year 12</b> (n=141)	<b>Year 13</b> (n=149)
<b>Level 1</b>	47	41	9
<b>Level 2</b>	4	66	24
<b>Level 3</b>	-	-	35

**TABLE 5: TAITA COLLEGE 2012 RESULTS**

	<b>Year 11</b> (n=83)	<b>Year 12</b> (n=116)	<b>Year 13</b> (n=82)
<b>Level 1</b>	49	35	5
<b>Level 2</b>	-	41	20
<b>Level 3</b>	-	-	40

**TABLE 6: HERETAUNGA COLLEGE**

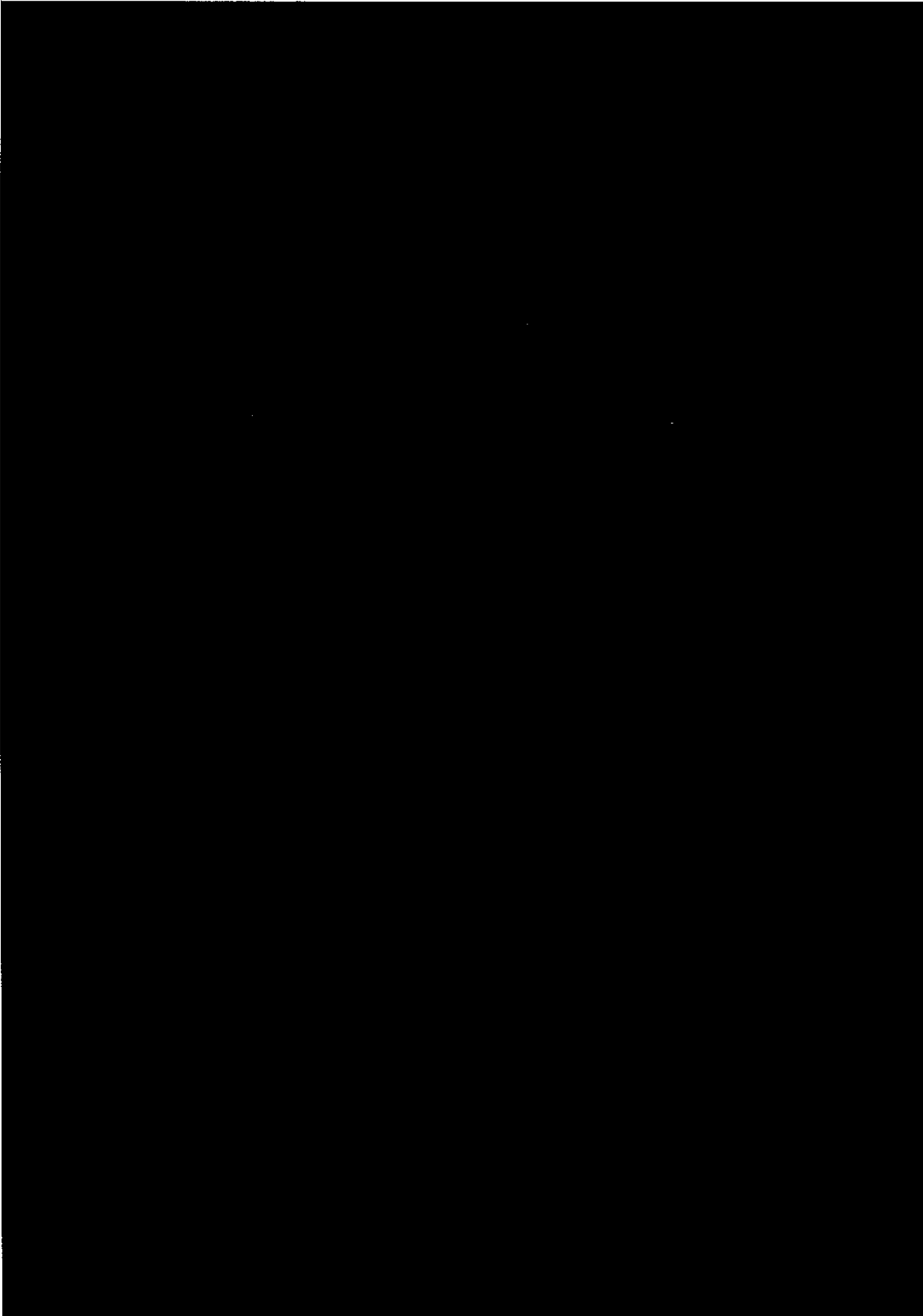
	<b>Year 11</b> (n=146)	<b>Year 12</b> (n=135)	<b>Year 13</b> (n=95)
<b>Level 1</b>	70	27	6
<b>Level 2</b>	-	73	20
<b>Level 3</b>	-	3	53

**TABLE 7: UPPER HUTT COLLEGE**

	<b>Year 11</b> (n=221)	<b>Year 12</b> (n=217)	<b>Year 13</b> (n=208)
<b>Level 1</b>	157	50	4
<b>Level 2</b>	-	153	49
<b>Level 3</b>	-	1	119



**APPENDIX 3: INDIVIDUAL PROGRAMME BASE PLAN**





**APPENDIX 4: REFERENCES FROM FAMILIES OF UVMS**

**LETTER 1**

[Redacted]

25 February 2014

s 9(2)(a) OIA

**To whom it may concern,**

My son, [Redacted] has been at Upper Valley Middle School [Redacted].  
[Redacted] During the time he has been at UVMS he has had a dramatic turn  
around in all school aspects, academic and social. s 9(2)(a) OIA

[Large redacted block]



s 9(2)(a) OIA



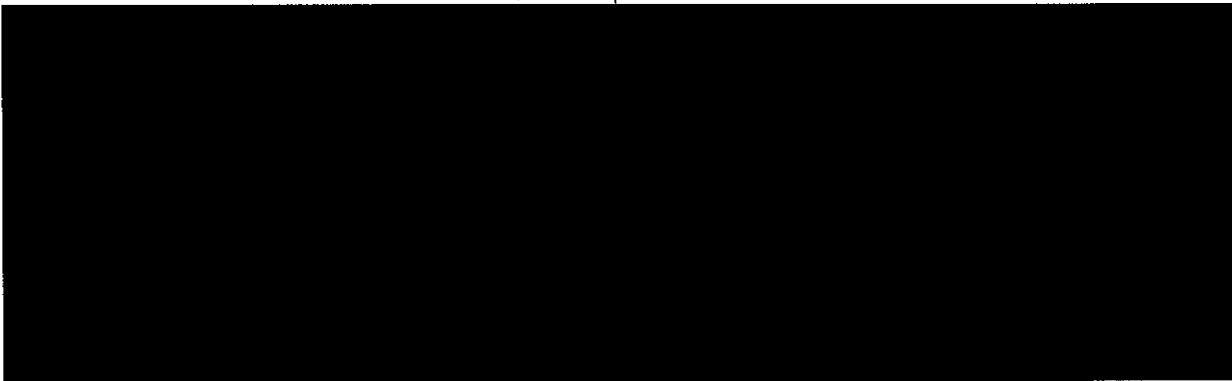
I am very keen to see UVMS become a Partnership School, it would make this kind of education available to lots more young people. [REDACTED] is not the only kid who struggles in the normal school. Other kids don't have the chance he has due to cost. [REDACTED] will now be an individual and not a statistic in the school system.

Yours sincerely,



s 9(2)(a) OIA

s 9(2)(a) OIA





LETTER 2

[Redacted]

s 9(2)(a) OIA

25/2/14

To whom it may concern,

I have a son who attended Upper Valley Middle School for 2 years. s 9(2)(a) OIA

[Redacted]

The model and size provided by Upper Valley, has meant he could not hide and he has been taught to persevere when learning does not come easily. He now understands that learning takes determination and it will be hard before it is easy. He has learnt to have confidence in his ideas and efforts. The small classes have meant he had the support in class when he needed it – he could not avoid working. The integrated curriculum increased his understanding of the subjects and his confidence improved as a result. These small successes have helped to develop his tenacity and resilience when things are difficult. With the focus on both learning and self-management, he has learnt to think and try to use words, not behavior, to express his emotions. He has learnt to ask for what he needs and express his concerns.

While other options existed some were out of reach or would only emphasis his failings. This unique model for these crucial, and I believe, last chance years has enabled my son to go see NCEA as something he can now achieve. s 9(2)(a) OIA

[Redacted] We could not afford to send even one boy to UVMS but our whanau have all contributed to his fees and his resulting success. We have had family and friends comment on the huge change in this young man.

He is now attending the local state high school. He is proactive with his learning, homework and time management. I have no doubt this confidence has been created on the foundations laid at UVMS – he learnt it takes effort but he can do it.

[Redacted]

s 9(2)(a) OIA



LETTER 3

[Redacted] s 9(2)(a) OIA

24 February 2014

TO WHOM IT MAY CONCERN

s 9(2)(a) OIA

Our son, [Redacted] has now been at Upper Valley Middle School for over two years. When he first started at the school we were very concerned at his progress. His concentration was poor, he rarely completed any work, and his behaviour was not good.

At UVMS [Redacted] has learnt to focus for longer periods of time and he has formed the habit of completing good work. He is a bright boy and we are now far more hopeful for his future. In the local state school he was getting worse and we are sure this improvement is because of the approach of the school. They take discipline seriously and have worked hard with [Redacted] to help him do his best. It has not always been easy to get him to this better place.

s 9(2)(a) OIA

Even though the school has given us a half-scholarship we have struggled to pay the fees but we we feel that having [Redacted] at UVMS has paid off. We hope it will be more available to other families like us.

Yours sincerely,

[Redacted] s 9(2)(a) OIA





## APPENDIX 5: COMMUNITY LETTERS OF SUPPORT

### PASIFIKA COMMUNITY LEADERS – SIONE AND SOKOPETI NA'A SINA

 s 9(2)(a) OIA

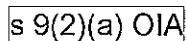
To Whom it May Concern,

We would like to see another school in this area. Some of our Pasifika children are not doing well in the local schools and more choice would be good for us. We have also been introduced to the work of the Upper Valley Middle School, and we are confident we can work with this school to help our young people.

We are both leaders in the Pasifika community in the Hutt Valley. We are heavily involved with our Pacific Islands' Council. Sione is a Pastor for the Tongan Methodist Congregation in Upper Hutt and Sokopeti works for Pacific Community Health Inc. Sokopeti does a lot of work with local Pacific people in lower decile areas and children who drop out of school at a very young age. Our main task is to help our people succeed and to reduce disadvantages within our communities.

We support the application for UVMS to become a Partnership School so our people can afford to attend.

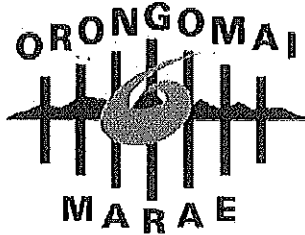
Yours faithfully,

 s 9(2)(a) OIA

  
Sione and Sokopeti Na'a Sina



ORONGOMAI MARAE



1 Railway Avenue  
P.O. Box 40-752  
Upper Hutt

Thursday the 27<sup>th</sup> of January 2014.

Re: Supporting Letter for Upper Valley Middle School's 'Partnership School' funding application.

To whom this may concern,

On behalf of Orongomai Marae Community Trust, I would like to forward this letter in support of Upper Valley Middle School's (UVMS) 'Partnership School' funding application for the following reasons.

The aforesaid UVMS proposal compliments our Ministry of Social Development contractual commitments. Our Marae works collaboratively with our local schools in supporting 'at risk' (predominantly low socio-economic) families to address their presenting and/ or underlying educational, health and social needs in our community. For a number of years, our marae has also observed an ongoing, increasing demand for viable alternative education providers in our community. By extension, our marae maintains extensive ethnic cultural and 'special needs' networking relationships within our region. Furthermore, our marae is willing to establish and maintain an ongoing, collaborative working relationship with the UVMS Community Liaison Manager in support of the Upper Valley Middle School's 'Partnership School' funding application.

In summary, our marae supports the UVMS' Partnership School' funding application as we believe that their approach addresses and enhances the educational, health and social needs of 'at risk' Maori, Pacific and/ or special needs children, young people and their families in our community. For further enquiries, please contact me.

Māuiora



s 9(2)(a) OIA

Linda Pahi  
General Manager  
Orongomai Marae Community Trust  
DDI: (04) 5289639  
e-mail: uppervalleymarae@xtra.co.nz

Health Clinic Tel: (04) 528-9409 Fax: (04) 528-9415  
Youth Workers Tel: (04) 527-8944 Fax: (04) 528-6432  
Counsellor Tel: (04) 528-6430 Fax: (04) 528-6432

Programmes Administrator Tel: (04) 528-9639 Fax: (04) 528-9640  
Caretaker Tel: (04) 528-3775 Fax: (04) 528-0432  
Treasurer Tel: (04) 528-9639 Fax: (04) 528-9640



s 9(2)(a) OIA



7 March 2014

**To Whom It May Concern**

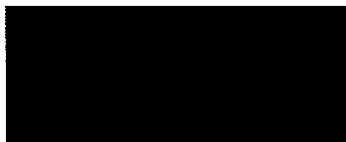
We wish to advise that we have become familiar with Upper Valley Middle School and all that they offer, over the past two years. Knowing that what they offer would make a big difference to the lives of young people that we work with we have explored the possibility of partnering with them, so as to make that option available, but currently finances create a barrier.

Prison Fellowship NZ would be keen to see UVMS accepted as a Partnership School as it would then make them a viable option for the young people we work with. These young people often need a change of environment, and to be given a schooling option where they gain more personalised attention, ability to work at their own level and be encouraged to excel, with understanding. We believe that Upper Valley Middle School is designed to provide this.

Not only would we see this as being beneficial to the young person themselves, but those around them and the community as a whole. A child that is going somewhere and getting the support they need to do so, is less likely to turn toward crime.

Should you have any further questions, please do not hesitate to contact the undersigned.

Yours faithfully



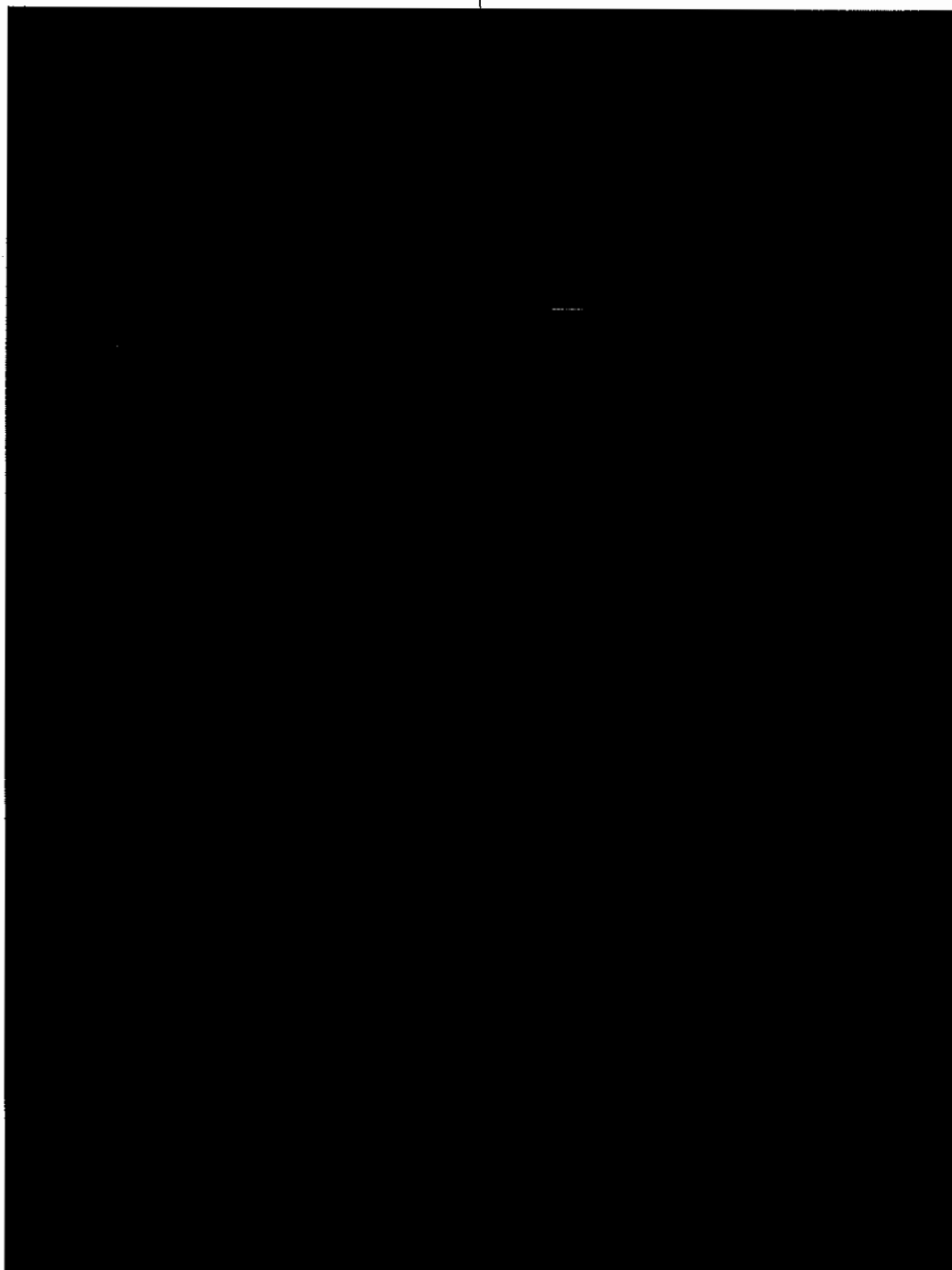
s 9(2)(a) OIA

National Office: Lane Park Business Centre, 16-22 Lane Street, PO Box 40657 Upper Hutt, New Zealand  
Phone: 0800 777 877 or +64 4 528 5419 Email: [info@pfnz.org.nz](mailto:info@pfnz.org.nz) Website: [www.pfnz.org.nz](http://www.pfnz.org.nz)



TEACHER & COMMUNITY WORKER

s 9(2)(a) OIA





s 9(2)(a) OIA



I would really like the Upper Valley Middle school to be able offer opportunities to others like these and to be able to multiply this story as it develops and grows. Having the school as a public, state school would mean that the hidden talents of children like these could blossom for the betterment of themselves and all of the community. Such schools have the potential of saving the state a lot of money keeping some of today's children from following the incarceration patterns of their parents. The \$90 000 per year that it costs to keep a prisoner could be a lot better spent redirected into Partner schools. Without public free education these children could never afford this type of schooling. It has the potential to be truly transformational in their lives.

I strongly support the Upper Valley Middle School's application to become a Partnership School.

Kind regards,

[Redacted signature] s 9(2)(a) OIA

Children and Families Worker – Wellington  
Scripture Union New Zealand



PO Box 760, Wellington 6140  
9A Oxford Terrace, Mt Cook, Wellington  
Phone: (04) 385 0485

[Redacted signature] s 9(2)(a) OIA

He rama tāu kupu ki āku wae – Your word is a lamp for my feet – Psalms 119:105



**CHILDREN'S, FAMILIES' & COMMUNITY WORKER**

To Whom It May Concern,

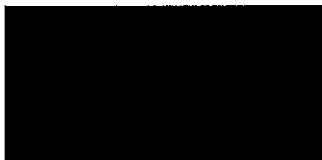
I, the undersigned, are keen to see another school in the upper valley, providing an alternative educational choice for students who are not achieving well in state schools. There is need for an alternative pathway for these students.

I work primarily with young people from low income and Māori and Pasifika families in the Timberlea area, who are not achieving to their full potential in their schooling. If Upper Valley Middle School becomes a partnership kura I will encourage families in my communities to send their young people to the kura.

I am keen to work with our families and the Community Liaison Manager to build relationships to ensure success for our whānau and to break habits of failure, and disengagement from society.

I will strongly promote UVMS among the most needy families in this area and support its ongoing development and growth.

Yours faithfully,



s 9(2)(a) OIA

Children's, Families, & Community Worker  
St Hilda's Anglican Church  
33-35 Cruickshank Road  
Upper Hutt



s 9(2)(a) OIA



s 9(2)(a) OIA

6 April 2013

To Whom it May Concern

**Upper Valley Education Trust Board – Application to become a Partnership School**

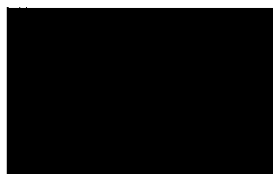
I understand that the trustees of the Upper Valley Education Trust Board are making an application to be considered as a Partnership School. I have known Bruce Billington [Board member] for about 15 years, and consider him to be someone of the highest integrity.

I have discussed this proposal with trustee members, and am of the view that the application has a great deal of merit. As a former Trustee and Chair of the Taita College Board of Trustees, I became painfully aware that the scholastic results for Upper Hutt and the northern Hutt Valley were well below those achieved in the Wellington /Kapiti area. From time to time, I encountered students who had significant learning problems which if addressed at an earlier age, would have enabled them to cope with a robust and at times cruel secondary school environment. I am not referring to children with conduct issues. My concern is for the small group of children who for a variety of reasons, need intense supervision and support, and who lack the necessary social skills or self-esteem to survive without close attention and secure parameters.

It is my view that the Upper Valley Middle School provides the sort of learning setting that would ideally suit the students who need that special attention.

For the above reasons, I support the application.

Yours sincerely



s 9(2)(a) OIA

RETHINKING CRIME AND PUNISHMENT

s 9(2)(a) OIA

P O Box 45 152/ Waterloo, Lower Hutt 5042/   
director@rethinking.org.nz/ Website: www.rethinking.org.nz



UPPER HUTT MAYOR



OFFICE OF THE MAYOR  
CITY OF UPPER HUTT

TO WHOM IT MAY CONCERN

RE: UPPER VALLEY MIDDLE SCHOOL

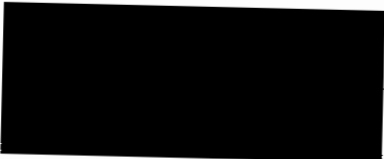
This letter is in support of the Upper Valley Middle School which is a new, independent school, located in Upper Hutt which opened in Term 1, 2012.

This school is an absolute asset to Upper Hutt as it provides a window of opportunity for outstanding learning for Year 2 to 10 students.

It not only gives Upper Hutt parents but the Wellington region an opportunity to send their children to a school which provides the best advantage for each and every student.

Since opening in 2012 the Upper Valley Middle School has grown and will continue to grow with the calibre of management and teaching staff that it employs.

This school provides a learning environment that is thorough, innovative and able to be applied to the best advantage to each student through their Individualised Education Plans. I certainly look forward to its continuing growth.

 s 9(2)(a) OIA

Wayne Guppy  
MAYOR  
March 2013



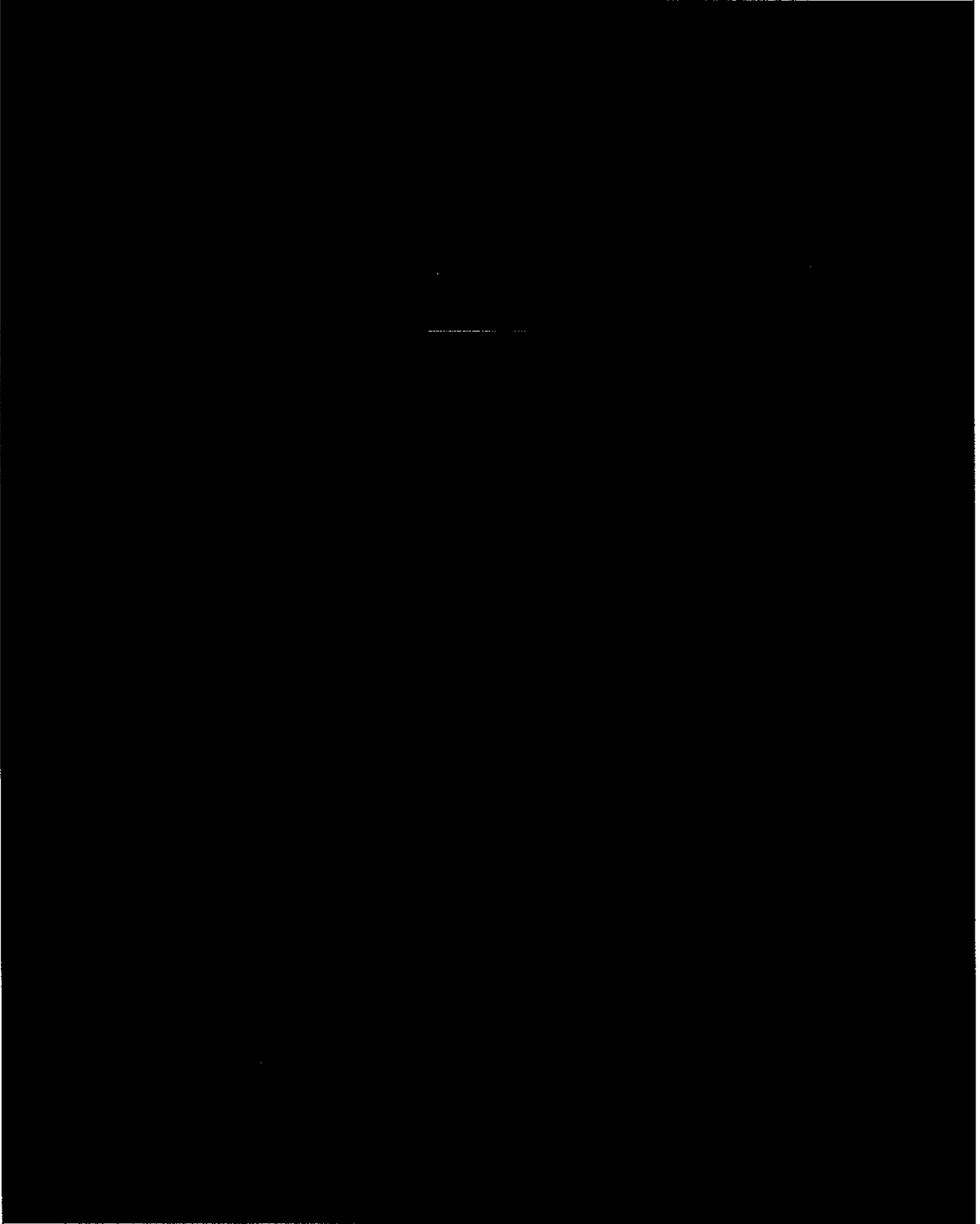


## APPENDIX 6: PROJECT ASSESSMENT RECORD

Following is the project assessment record for the first year 8 project in 2013.

s 9(2)(a) OIA

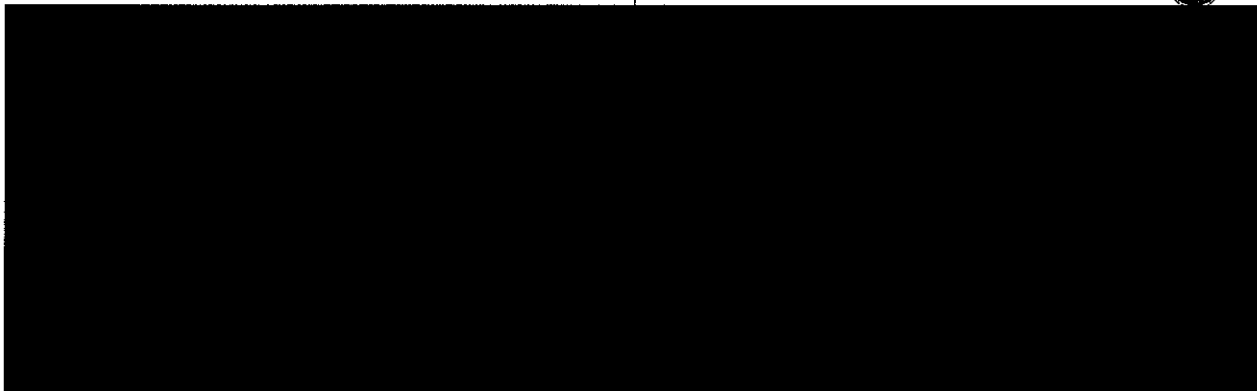
Upper Valley Middle School: Project Assessment Record



s 9(2)(a) OIA

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s 9(2)(a) OIA





**APPENDIX 7: 2014 CALENDAR YEAR.**

	3-Feb	10-Feb	17-Feb	24-Feb	3-Mar	10-Mar	17-Mar	24-Mar	31-Mar	7-Apr	14-Apr
<b>TERM 1</b>	Week 1	Week 2	Week 3	Week 4	Week 5	Week 6	Week 7	Week 8	Week 9	Week 10	Week 11
Monday	Teacher Only Day									Family Evening	
Tuesday	Term 1 Begins										
Wednesday			School Info Evening			Project 1 Due					
Thursday	Waitangi Day					TRAMP Orongo-rongos					Project 2 Due End Term 1
Friday											Good Friday
<b>TERM 2</b>	Week 1	Week 2	Week 3	Week 4	Week 5	Week 6	Week 7	Week 8	Week 9		
Monday	Term 2 Begins				Queens Birthday						
Tuesday											
Wednesday						Family Evening					
Thursday											
Friday				Adrenalin Day	Project 3 Due			Open Day/Info Day	Project 4 Due End Term 2	Reports Posted	



	28-Jul	4-Aug	11-Aug	18-Aug	25-Aug	1-Sep	8-Sep	15-Sep	22-Sep	
<b>TERM 3</b>	Week 1	Week 2	Week 3	Week 4	Week 5	Week 6	Week 7	Week 8	Week 9	
Monday	Term 3 Begins									
Tuesday										
Wednesday						Family Evening				
Thursday										
Friday			Extreme Sports Day		Project 5 Due				Project 6 Due End Term 3	
	13-Oct	20-Oct	27-Oct	3-Nov	10-Nov	17-Nov	24-Nov	1-Dec		
<b>TERM 4</b>	Week 1	Week 2	Week 3	Week 4	Week 5	Week 6	Week 7	Week 8		Dates are subject to change
Monday	Term 4 Begins		Labour Day							The camp in particular is yet to be confirmed
Tuesday										
Wednesday		CAMP -								
Thursday		Kapiti					School Dinner/ Picnic		Prizegiving	
Friday				Project 7 Due				Project 8 due End Term 4	Reports Posted	



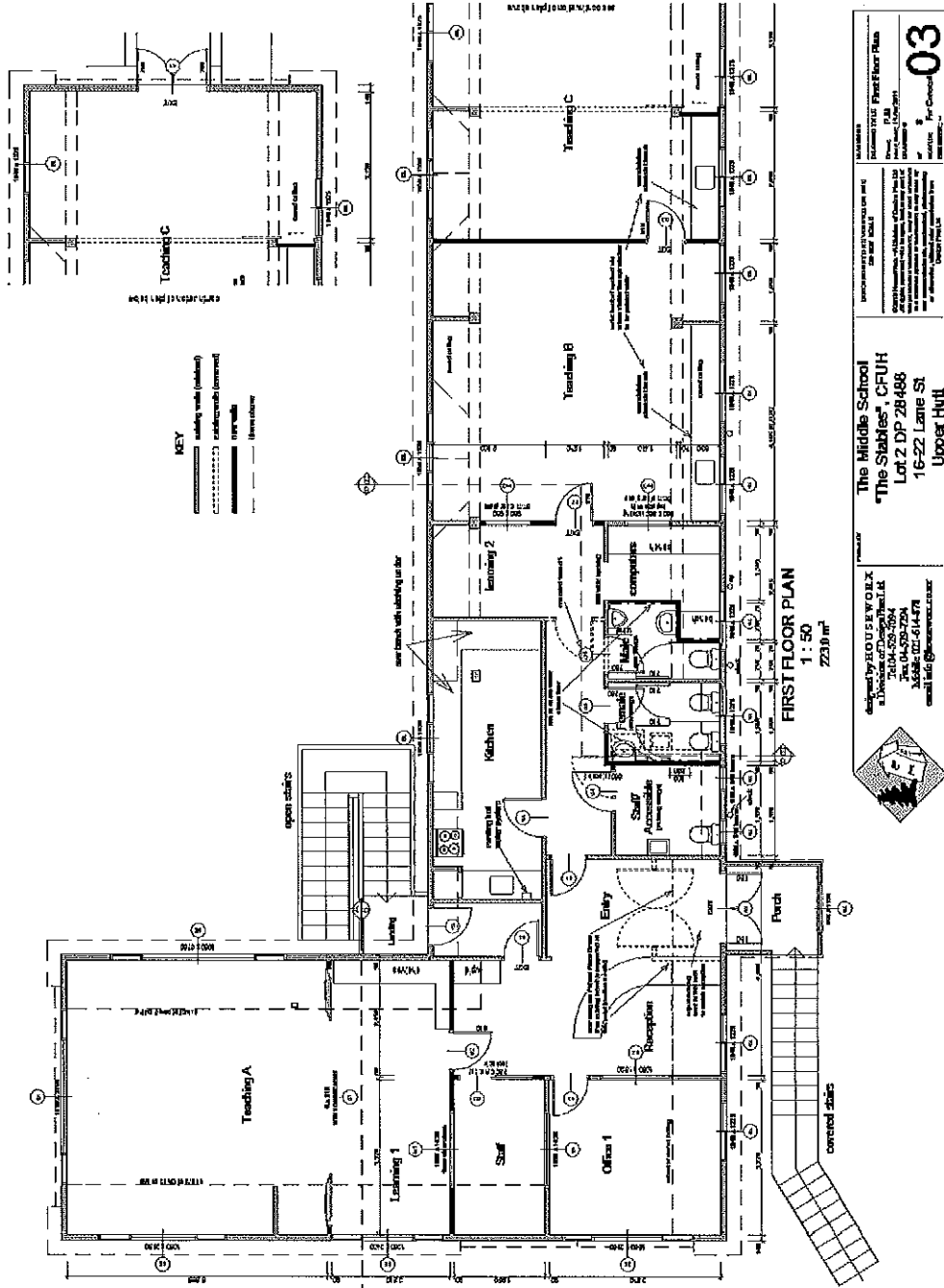
## APPENDIX 8: CURRENT UVMS POLICIES

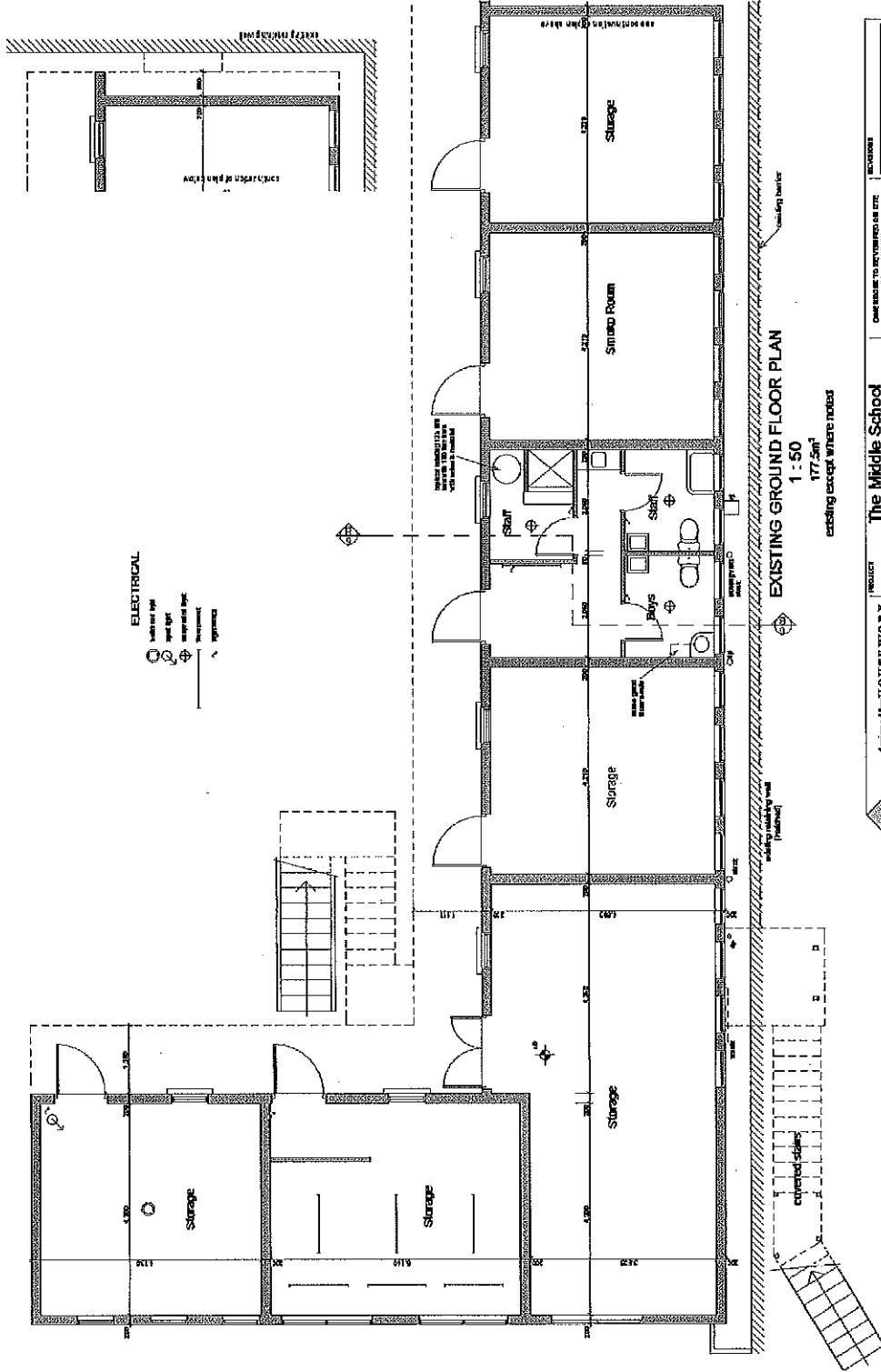
The following is a list of the policies UVMS currently has documented. These will be reviewed and amended where necessary.

<b>POLICIES</b>	<b>Policy No.</b>	<b>Date Updated</b>
Curriculum Delivery (Nag 1)	101	July 2012
Assessment (Nag 1)	102	July 2012
Equity (Nag 1)	103	July 2012
Achievement of Maori Students (Nag 1)	104	July 2012
Literacy & Numeracy (Nag 1 )	105	July 2012
Treaty of Waitangi (Nag 1 )	106	July 2012
Education Outside the Classroom (Nag 1 )	107	July 2012
School Self-Review (Nag 2 )	201	July 2012
Reporting on Student Progress (Nag 2 )	202	July 2012
Personnel Management (Nag 3 )	301	July 2012
Equal Employment Opportunities (Nag 3)	302	July 2012
Appointment of Staff (Nag 3)	303	July 2012
Complaints (Nag 3)	304	July 2012
Performance Management (Nag 3)	305	July 2012
Academic Manager Appraisal (Nag 3)	306	July 2012
Financial Management (Nag 4)	401	July 2012
School Fees (Nag 4)	402	July 2012
Foreign Students (Nag 4)	403	July 2012
Property Management (Nag 4)	404	July 2012
Health and Safety (Nag 5)	501	July 2012
Emergency Evacuation (and Procedures) (Nag 5)	502	July 2012
Behaviour Management (Nag 5)	503	July 2012
Administering Medication (Nag 5)	504	July 2012
Attendance (Nag 6)	601	July 2012
Copyright (Nag 6)	602	July 2012
Animal Welfare (Nag 6)	603	July 2012
Smoke Free Environment (Nag 6)	604	July 2012
Privacy (Nag 6)	605	July 2012
Suspension of Student (Nag 6)	606	July 2012
Protected Disclosures Policy	607	July 2012
Harassment Policy	608	July 2012
EOTC	609	July 2012



**APPENDIX 9: FLOOR PLANS FOR THE STABLES**





	DESIGNED BY: J.P. OUSEY W.O.B.K. 1001 1/2 Rte 101, Laconia, NH 03246 Tel: 603-529-7094 Fax: 603-529-7294 Mobile: 603-614-8778 e-mail: jousey@jouseywk.com	PROJECT <b>"The Middle School"</b> "The Stables", C/FUH Lot 2 DP 28488 16-22 Lane St Upper Hutt	ISSUES OWNER: TRC Ground Floor DATE: P.A. 2011 DATE: 01/12/2011 DRAWN BY: J.P. OUSEY CHECKED BY: J.P. OUSEY SCALE: As Shown DATE: 01/12/2011
	CONSTRUCTION NO. 02		

OWNER RESPONSIBILITY: OWNER TO BE NOTIFIED OF ANY CHANGES TO THE PLAN. ALL INFORMATION IS BASED ON THE INFORMATION PROVIDED BY THE CLIENT. THE DESIGNER ASSUMES NO LIABILITY FOR THE ACCURACY OF THE INFORMATION PROVIDED BY THE CLIENT. THE DESIGNER ASSUMES NO LIABILITY FOR THE ACCURACY OF THE INFORMATION PROVIDED BY THE CLIENT. THE DESIGNER ASSUMES NO LIABILITY FOR THE ACCURACY OF THE INFORMATION PROVIDED BY THE CLIENT.



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

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

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

REDACTED



## APPENDIX 11: JOB DESCRIPTIONS FOR LEADERSHIP ROLES

### JOB DESCRIPTION – ACADEMIC MANAGER

#### Responsibility and Tasks

1. Curriculum Implementation, Feedback, Co-ordination
  - a. Implementation of the project based model
  - b. Design and marking of all projects
  - c. Ensuring New Zealand curriculum standards are maintained
  - d. Management of resources for school with the Business Manager
  - e. Schemes of work are prepared, implemented, evaluated and improved
2. Students
  - a. Writing IPBs
  - b. Knowledge of students through teaching
  - c. Discipline of students
  - d. Pastoral care of students
  - e. Student progress is effectively monitored and recorded
3. Communicating with current parents, families and whānau .
  - a. Web page, Email and other updates as appropriate
  - b. Reports & Marks sheets
  - c. Liaising with parents, families and whānau
4. Publicity and Public Relations
  - a. Marketing to inform new parents, families, whanau and local community.
  - b. Promotion and enrolment of students
  - c. Good relationships established with local schools, media.
  - d. Developing and maintaining productive partnerships with other organisations and agencies in the community
5. Employment of Staff and Staff Development
  - a. Ensuring all employed staff are outstanding professionals
  - b. Ensuring that the basic ethos is maintained in terms of the teaching role to be preparing, teaching, assessing, reporting.
  - c. Performance appraisal and review
  - d. Ensuring staff have sufficient and appropriate opportunities for professional development.
6. Management
  - a. Liaison and co-operation with Business Manager
  - b. Liaison and co-operation with Community Liaison Manager
  - c. Revision of school policies
  - d. 6 monthly reports to Villa Education Trust Board on Academic Programme and school development
7. Academic leadership across Villas
  - a. Part of the professional leadership team operating across all Villas
  - b. Liaison and co-operation with the Academic Manager.

#### Attributes and qualifications

- Registered teacher
- Leadership experience
- Commitment to the Villa Education Trust mission and values
- Desire to work with priority learners
- Reflective practitioner
- Excellent oral and written communication skills



- Strong interpersonal skills
- Relevant post graduate qualifications

## JOB DESCRIPTION – BUSINESS MANAGER

### Key Responsibilities

1. Staff Employment Contracts
2. Property and Resourcing
3. Financial Reporting
4. Staffing of Administration Area
5. Promotion of School
6. Reporting and Appraisal of model implementation

### Specific Tasks

7. Current contracts and documentation up to date
8. Resource requirements for staff
9. Financial records
10. Invoicing and payments
11. Payroll
12. Monthly accounts
13. Decision making re suppliers etc
14. Supervision and support of administration staff
15. Performance appraisal and review
16. Delegation of tasks to administrator
17. Marketing in liaison with Academic Manager
  - a. Web site
  - b. Prospectus
18. Newspaper and school newsletter advertising
19. General public awareness
20. 6 monthly performance reports to Trust Board

The Business Manager is an offsite position so responsibility of some tasks will be delegated to the Office Manager at each Villa.

### Attributes and Qualifications

- Business degree or similar
- Relevant commercial experience
- Commitment to the Villa Education Trust mission and values
- Desire to work with the local communities
- Excellent oral and written communication skills
- Strong interpersonal skills



## JOB DESCRIPTION - COMMUNITY LIAISON MANAGER

### Responsibilities and Tasks

1. Students
  - a. Pastoral care of students
  - b. Student progress is effectively monitored and recorded
  - c. Attendance is monitored, encouraged and appropriate actions undertaken if needed
2. Communicating with current parents, families and whānau .
  - a. Visiting current and prospective families
  - b. Liaising with parents, families and whānau
  - c. Developing productive partnerships focused on student achievement.
3. Development of community programme
  - a. Working with local agencies and organisations to offer opportunities to parents, families and whānau.
  - b. Establishing the school as place for parents, families and whānau
  - c. Oversight of the Whānau room.
4. Publicity and Public Relations
  - a. Marketing to inform prospective new families and local community.
  - b. Promotion and enrolment of students
  - c. Productive relationships established with local schools, media, churches and community groups
5. Management
  - a. Liaison & co-operation with Office Manager
  - b. Liaison & co-operation with Academic Leader Manager
  - c. Revision of school policies
  - d. 6 monthly reports to Villa Education Trust Board on Villa development

## JOB DESCRIPTION – OFFICE MANAGER

### Key Responsibilities

1. Office management of School
2. Parent liaison
3. Staff support
4. Communication

### Specific Tasks

1. Email, phone and counter enquiries as required
2. Liaise with Business Manager and complete specific tasks
3. International student support and code fulfilment (if applicable)
4. Asset and property management (includes registers, maintenance, disposal)
5. IT support on site
6. Website current at all times
7. Develop clear systems where necessary
8. Reports - Term 2 and 4 templates created and mailout prepared
9. Promotion of school
10. Absences to be up to date
11. At all times ensure general tidiness of the school property.
12. Stationery and supplies ordering
13. Filing
14. Uniform ordering and selling



15. Photocopying of forms etc as required
16. Medical Assistance and Supplies
17. Ensure student files are kept up to date and ENROL system used correctly.

#### **Termly**

1. Liaise with dental and health officials for school visits
2. Attendance registers completed
3. Execution of Fire Drill and Safety checks
4. Maintenance reports

#### **Accounts**

1. Monthly accounts payable
2. Invoicing of students each term, fees, uniforms and additional expenses.
3. Additional invoicing
4. Account queries
5. Petty cash,
6. End of year financials with Business Manager

#### **Additional**

1. Event organisation e.g. prizegiving, camp, music night, community events
2. Extra administrative tasks as specified by Business Manager

#### **Attributes and Qualifications**

- Flexibility of hours
- Initiative
- Computer Skills
- Professional manner
- Strong interpersonal skills

#### **Hours of work**

- Mon to Fri 8.30am – 3.30pm
- Term time only with limited hours by negotiation over school holidays.

s 9(2)(a) OIA

REDACTED





**APPENDIX 13: IMPLEMENTATION PLAN**

	Building	Resources	Staffing	Enrolment	Community
2014 July	<ul style="list-style-type: none"> <li>Finalise arrangements to extend area covered by the lease</li> <li>Specify plans for alterations including grounds</li> <li>Set up the Whānau Room.</li> </ul>	<ul style="list-style-type: none"> <li>Create list of resources required</li> <li>Start sourcing extra furniture/IT suppliers and quotes</li> </ul>	<ul style="list-style-type: none"> <li>Advertise for new positions (Particular focus on the positions of Academic Manager and Community Liaison Manager which need to be filled before the end of the year.)</li> </ul>	<ul style="list-style-type: none"> <li>Arrange enrolment documents</li> <li>Applications open.</li> </ul>	<ul style="list-style-type: none"> <li>Announce details of change.</li> <li>Displays and notices</li> <li>Begin consultation</li> </ul>
Aug	<ul style="list-style-type: none"> <li>Complete plans for alterations</li> <li>Confirm consents for all changes</li> <li>Quotes from builders for the work</li> </ul>	<ul style="list-style-type: none"> <li>Continue work</li> </ul>	<ul style="list-style-type: none"> <li>Short list and interview</li> <li>Finalise appointment of Academic Manager.</li> <li>Send to MHMS for induction.</li> <li>Finalise employment</li> </ul>	<ul style="list-style-type: none"> <li>Meet parents who enquire and provide information</li> </ul>	<ul style="list-style-type: none"> <li>Notify all community workers and leaders, in the school target area, who work with priority learners</li> <li>Public Meeting</li> <li>On-going networking</li> </ul>
Sep	<ul style="list-style-type: none"> <li>Begin alterations to new classrooms</li> </ul>	<ul style="list-style-type: none"> <li>Continue work</li> </ul>	<ul style="list-style-type: none"> <li>Community Liaison Manager employment begins</li> <li>Send to MHMS and SAMS for induction.</li> </ul>	<ul style="list-style-type: none"> <li>First round of enrolments closes</li> <li>Ballot if need be</li> </ul>	<ul style="list-style-type: none"> <li>Community Liaison Manager visits homes, community groups and schools</li> </ul>
Oct	<ul style="list-style-type: none"> <li>Continue alterations</li> <li>Adapt the gym and put in playground equipment</li> </ul>	<ul style="list-style-type: none"> <li>Finalise all orders and start purchasing</li> </ul>			<ul style="list-style-type: none"> <li>Public Meeting</li> </ul>
Nov	<ul style="list-style-type: none"> <li>Continue with alterations</li> </ul>		<ul style="list-style-type: none"> <li>Fill any final positions</li> </ul>	<ul style="list-style-type: none"> <li>Second round of enrolment if needed.</li> </ul>	<ul style="list-style-type: none"> <li>Community Day to view school</li> </ul>
Dec	<ul style="list-style-type: none"> <li>Finalise last details</li> </ul>	<ul style="list-style-type: none"> <li>Final acquisitions</li> <li>School setup</li> </ul>		<ul style="list-style-type: none"> <li>Start to finalise roll for 2015</li> </ul>	
2015 Jan	<ul style="list-style-type: none"> <li>Ensure all facilities working as expected</li> </ul>		<ul style="list-style-type: none"> <li>Staff employment begins</li> <li>Teacher Only Days</li> </ul>		<ul style="list-style-type: none"> <li>Official opening of school as a PSKH school</li> <li>Dawn Blessing</li> </ul>



Feb			<ul style="list-style-type: none"> <li>• School commences</li> </ul>	<ul style="list-style-type: none"> <li>• On-going liaison and consultation</li> </ul>
Mar		<ul style="list-style-type: none"> <li>• Assess any further resources needed and purchase</li> </ul>	<ul style="list-style-type: none"> <li>• Conduct preliminary staff appraisals.</li> </ul>	
Apr			<ul style="list-style-type: none"> <li>• Staggered visits to MHM/S for newly appointed staff</li> </ul>	<ul style="list-style-type: none"> <li>• Applications open.</li> </ul>
May				<ul style="list-style-type: none"> <li>• Meet parents who enquire and provide information</li> </ul>
Jun		<ul style="list-style-type: none"> <li>• Assess any further resources needed and purchase</li> </ul>		<ul style="list-style-type: none"> <li>• Acceptance of first round of interviews</li> </ul>
Jul				<ul style="list-style-type: none"> <li>• Continue</li> </ul>
Aug				<ul style="list-style-type: none"> <li>• Continue</li> </ul>
Sep	<ul style="list-style-type: none"> <li>• Reassess needs for following year. Any changes needed?</li> </ul>			<ul style="list-style-type: none"> <li>• Enrolments for 2016 close</li> </ul>
Oct	<ul style="list-style-type: none"> <li>• Adjust plans if necessary.</li> </ul>	<ul style="list-style-type: none"> <li>• Assess any further resources needed and purchase</li> </ul>		
Nov				<ul style="list-style-type: none"> <li>• If necessary second round of enrolments</li> </ul>
Dec				



## APPENDIX 14: APPOINTMENTS POLICY

### Rationale

In its appointment of new staff to Upper Valley Middle School the Board aims to ensure that the most suitably qualified and experienced people are recruited and that its procedures are consistent with all statutory and contractual obligations. Through appointing the highest quality staff Upper Valley Middle School seeks to provide excellent learning opportunities to its students.

### Purpose

The purpose of the appointments policy is to establish a series of guidelines to assist in the recruitment and appointment of staff in order to ensure that:

1. Upper Valley Middle School is staffed with the best available personnel
2. Upper Valley Middle School is fully staffed in all areas of operations
3. That in appointing staff the Board follows all relevant provisions of the NEGs

### Guidelines

1. As the legal employer of all staff in Upper Valley Middle School, the Trust Board will ratify all appointments at a full Board meeting
2. The Academic Manager will oversee all appointments made in Upper Valley Middle School.
3. The full Board will be involved in the appointment of the Academic Manager
4. The Board delegates to the Business Manager the appointment of all support staff.
5. In deciding on the nature of a vacancy full consideration will be given to the current and future needs of Upper Valley Middle School
6. For each vacancy there will be a job description, person specification and performance agreement available for applicants
7. In making appointments the provisions of Upper Valley Middle School EEO policy and programme will be fully considered
8. New appointees will be offered an individual employment agreement in accordance with the Employment Relations Act.
9. In its appointment procedure the Board will endeavour at all times to meet the requirements of the Human Rights and Privacy Acts.
10. An external educational professional may be engaged at any time to assist in the process of making appointments
11. For each appointment a report will be given to the Board detailing the process followed, the numbers of applicants, those short listed and the rationale for final appointment.

Ratified by Board: \_\_\_\_\_ Signed for TRUST BOARD  
 \_\_\_\_\_ Date  
 Reviewed: \_\_\_\_\_ Date  
 \_\_\_\_\_ Signed for TRUST BOARD



## APPENDIX 15: PERFORMANCE MANAGEMENT POLICY

### Rationale

This school recognises the need to evaluate regularly the quality of teaching and learning at all levels relative to agreed standards of teaching performance and to the school's goals and objectives as expressed in the charter.

To achieve this, a system of staff performance appraisal is carried out with the aim of improving the quality of teaching and learning outcomes achieved by the school and its staff by providing support and development opportunities that will enable them to achieve their personal and professional goals.

### Guidelines

1. The Academic Manager has the delegated responsibility for the implementation of the appraisal policy.
2. The appraisal of the Academic Manager is the responsibility of the Board.
3. A negotiated written statement as to the process is agreed to by the parties concerned.
4. The appraiser and the appraisee will set development objectives and outline the support required.
5. The appraisal process will include:
  - a. Observation of teaching.
  - b. Discussion of achievement of performance expectation with appraiser.
6. An appraisal report prepared in consultation between appraiser and appraisee.
7. All documents are confidential to the person being appraised and his/her appraiser. Information that is no longer relevant to the appraisal will be destroyed.
8. Appraisal occurs bi-annually
9. Reports will be provided to the Board when appropriate and will be of a general nature to facilitate funding

In the event of a dispute, the appraiser and the appraisee meet with a third party acceptable to both. If a compromise cannot be reached a mediator is appointed who establishes guidelines for the outcome of the mediation

Ratified by Board: \_\_\_\_\_ Signed for TRUST BOARD  
\_\_\_\_\_ Date  
Reviewed: \_\_\_\_\_ Date  
\_\_\_\_\_ Signed for TRUST BOARD

