

INTEGRATION AGREEMENT

This Agreement is made as a Deed on the 17th day of June 2020

Between:

Her Majesty the Queen in right of New Zealand acting by and through the **Minister of Education** ("**the Minister**")

and

Motueka Steiner School Proprietors Trust ("**the Proprietor**"),

together **the Parties**.

Background

- A. The Proprietor is a body corporate that intends to establish and integrate Motueka Steiner School ("**the School**").
 - B. The School will be for students from Year 1 to Year 8 offering education with a special character as defined in the Act and described in this Agreement.
 - C. The Proprietor is the lessee of the School premises specified in Schedule 1.
 - D. The Parties have agreed to enter into this Agreement pursuant to the Act, to establish the School as a State integrated school.
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Terms of agreement

Definitions

- 1 In this Agreement, unless the context requires otherwise, terms not otherwise defined in this Agreement have the meanings specified in the Act and:
 - (a) *Act* means the Education Act 1989 as amended or replaced from time to time and includes all regulations and rules made under the Act;
 - (b) *Agreement* means this Integration Agreement, as amended by any Supplementary Agreements from time to time;
 - (c) *Depreciation Rate* means four percent (4%) of the depreciated value of state school buildings as set out in the "Statement of Accounting Policies" in the Ministry of Education's Annual Report;
 - (d) *Effective Date* means 1 July 2020;
 - (e) *Minister* means the person holding the office of Minister of Education from time to time and also includes any other Minister of the Crown who is responsible for the administration of Part 33 of the Act;
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- (f) *Supplementary Agreement* means any supplementary agreement entered into by the Parties in writing to amend this Agreement; and
- (g) *Works* means the capital works specified in Schedule 2.

A reference to a particular provision in the Act includes any provision that is intended to be a replacement or substitute for that provision.

Special character

- 2 As from the Effective Date, the School is established as a State integrated school under Part 33 of the Education Act 1989 to provide education with a special character (through its teaching and conduct) as follows:

The school is a Rudolf Steiner Waldorf School in a farm setting in which Rudolf Steiner's Art of Education is practised with a special emphasis on respecting nature and caring practically for the environment. Anthroposophy, as a world-conception, its description of the universe and the Human being, is the basis of the art of education and of all endeavours in the school.

This education, with its special character, includes the observance of festivals and religious instruction, which is Christian in its deepest sense, free of dogma or sectarianism.

The College of Teachers, which works collegially and in a spiritual way, shares responsibility for maintaining the special character of the school and the anthroposophical impulse which is inherent in all aspects of school life.

Integration must not jeopardise the education with a special character of the School. This agreement must be interpreted in a way that is consistent with the maintenance and preservation of this education with a special character.

- 3 The Proprietor has (and must at all times during the term of this Agreement continue to have):
 - (a) responsibility for -
 - (i) determining the special character of the School; and
 - (ii) supervising the maintenance and preservation of that special character;
 - (b) the right to determine what is necessary to preserve and safeguard the special character of the education provided by the School.
 - (c) the right to access to the School at all reasonable times to ensure that the special character of the education provided by the School is being maintained.
- 4 The Proprietor may specify (by notice in writing to the board of trustees of the School) what the Proprietor considers to be necessary to provide, maintain, preserve and/or safeguard education with the special character of the School.

- 5 The Proprietor shall regularly monitor the operation of the School to ensure that education with the special character is at all times provided, maintained, preserved and safeguarded by the School.
- 6 The Proprietor may invoke the powers conferred upon a proprietor by Part 33 of the Act if, in the opinion of the Proprietor:
- (a) the special character of the School has been, or is likely to be, jeopardised; or
 - (b) education with that special character is no longer being preserved and safeguarded.

For this purpose, "jeopardise" includes when the School is not acting consistently with any notice provided by the Proprietor under clause 4.

School programme

- 7 The parties agree that religious observances and religious instruction form part of the education with a special character provided by the School. The instruction and observances that are to form part of the School's programme after integration are Christian in its deepest sense, free of dogma or sectarianism and includes the observance of festivals.

School premises

- 8 As at the Effective Date the Proprietor will be the lessee of (including on the basis that it may be applied for purposes provided for by, and consistent with, the terms of this Agreement) all the land and improvements specified in Schedule 1 ("**the School premises**").
- 9 The Proprietor may make available for use by the School any other land, buildings, and/or associated facilities (not forming part of the School premises) that the Proprietor considers may assist with providing and maintaining the special character of the School.
- 10 The Proprietor must at all times during the term of this Agreement continue to own or lease the School premises or hold the School premises in trust (including on the basis that it may be applied for purposes provided for by, and consistent with, the terms of this Agreement).
- 11 The Proprietor must plan (including obtaining all consents and approvals required by law), implement and complete (consistent with all consents and approvals) and pay for:
- (a) the Works; and
 - (b) such capital works and associated facilities at the School as the Minister may from time to time (by notice in writing to the Proprietor) approve, with a view to replacing, improving or enlarging the School, its buildings and its associated facilities in order to maintain the School premises at, or consistent with, the minimum standards specified by the Secretary for comparable State schools; and
 - (c) such capital works and associated facilities at the School as the Minister may from time to time (by notice in writing to the Proprietor) require (acting reasonably) because they are necessary in order to maintain the School premises at, or

consistent with, the minimum standards specified by the Secretary for comparable State schools.

- 12 The Minister will support the Proprietor by providing, as a minimum, eighty-five percent (85%) of the non-integrated school funding rate of additional property costs resulting from future educational policy change. In-ground costs may be included if they are an integral part of delivering education as a result of the policy change. Funding eligibility is subject to the following:
- (a) the funding to be provided will be determined by an assessment by the Minister of the investment the Proprietor would need to undertake to meet the requirements of the policy change; and
 - (b) an assessment by the Minister that the school is sustainable and likely to remain open over the medium term (at least five to ten years).
- 13 At all times during the term of this Agreement, the Proprietor (and not the Minister, the Secretary, the Ministry or any other person) will:
- (a) be solely responsible for complying with the terms and conditions (including making all payments, in full and on time) under any mortgage, lien, or other charge or security interest over or affecting the land and buildings making up the School premises; and
 - (b) maintain insurance for the School premises in accordance with sections 456(g) and (h) of the Act.
- 14 Nothing in clauses 11 or 12 shall limit any right or entitlement the Proprietor may have to request, apply for or receive property funding from the Ministry.

Discharge of Maintenance Obligations

- 15 The Minister will, after the Effective Date, pay to the Proprietor in each year the Sum as determined under Schedule 3 to:
- (a) assist the Proprietor in maintaining the School premises and the associated facilities in a condition equivalent to that of a comparable non-integrated state school;
 - (b) provide for the maintenance of the School chattels as though the School were a non-integrated state school.
- 16 The School will be entitled to such furniture and equipment as the Minister supplies from time to time to comparable non-integrated state schools.
- 17 The Minister may pay the Sum to the Proprietor in instalments on the same dates as the Minister provides operations funding to the Board of Trustees.
- 18 The Proprietor must on receipt of the Sum in each year undertake the maintenance of that part of the School premises not required to be undertaken by the Board of Trustees during the course of that year to the standard to which the Crown maintains comparable state schools.

- 19 The Sum shall be applied to meet the obligations in clause 18. After the obligation in clause 18 has been met in full and if there is a balance of the sum remaining the Proprietor may apply the balance in the following ways:
- (a) to capital works or other purposes directly related to the School;
 - (b) to maintenance, capital works or other purposes related to any other integrated school.
- No liability for default in certain circumstances*
- 20 Neither party will be liable for any act, omission, or failure to fulfil its obligations under this Agreement, if such act, omission or failure arises from any cause reasonably beyond its control including acts of war, epidemics, earthquakes, or other natural disasters or acts of God. ("Force Majeure Event").
- 21 The party unable to fulfil its obligations due to a Force Majeure Event shall:
- (a) immediately notify the other in writing and provide full information concerning the Force Majeure Event including an estimate of the time likely to be required to overcome the event;
 - (b) use its best endeavours to overcome the event; and
 - (c) continue to perform its obligations as far as practicable.
- 22 Despite clause 20, if in any year Parliament has not appropriated sufficient public money to enable the Minister to maintain non-integrated state schools, the Minister will not be required to pay the instalments of the Sum from that point onward until an appropriation is so made. In that event the Minister will only pay the instalments of the Sum due from the date on which that appropriation is made.
- 23 If the Sum is not paid as a result of clause 22, the Minister's assistance to the Proprietor under this Agreement to maintain the School premises, from the point that Parliament decides not to appropriate the monies until an appropriation is made that enables the payment of the Sum to be recommenced, will not be discharged and the Minister will remain required to provide that assistance on the same basis as to other state schools.
- Information*
- 24 The Minister may by notice to the Proprietor, require the Proprietor to supply to the Minister any information including but not limited to accounting or banking records in the possession or control of the Proprietor (whether stored on electronic media or otherwise) relating to the performance of the Proprietor's obligations under clauses 15 – 23.
- 25 The Minister shall be entitled to make and retain copies of any information supplied to the Minister in accordance with clause 24.
- Disputes*
- 26 The Minister and the Proprietor shall endeavour to resolve by negotiation any disputes that arise between them concerning clauses 15 – 23 within 30 days of one party advising the other of the existence of the dispute.

- 27 If the Minister and the Proprietor are unable to resolve a dispute by negotiation, they shall refer the matter to mediation and shall choose jointly a mediator. If the parties are unable to agree on the appointment of a mediator then the mediator shall be appointed by the then New Zealand President of the Resolution Institute or, failing that, by the then President of the New Zealand Law Society. The mediation shall thereafter be conducted by the mediator in accordance with the usual practice for the Resolution Institute mediation.
- 28 The obligations of the Minister and of the Proprietor under clauses 15 – 23 shall not be affected by any dispute regarding these clauses, and each party shall continue to perform its obligations as if the dispute had not arisen.
- 29 Breach of obligations under clauses 15 – 23.
- (a) If the Proprietor is in breach of its obligations under clauses 15 – 23, and if in the reasonable opinion of the Minister the breach is able to be remedied, the Minister may by notice to the Proprietor require that the breach be remedied within 60 days (or such further or other period as may be specified) of the date of the notice.
 - (b) If the breach is not remedied within the period specified in the notice, or if in the reasonable opinion of the Minister the breach is not capable of being remedied, the Minister may terminate clauses 15 – 29 of this Agreement on giving 14 days notice to the Proprietor.
 - (c) If clauses 15 – 29 of this Agreement are terminated in accordance with this clause the balance of this Agreement shall continue to apply to both parties.
 - (d) Nothing in this clause shall be construed as limiting or affecting the powers that the Minister has under the Act.

Proprietor's interest in the integrated property

- 30 The parties acknowledge the following principles in relation to the Proprietor's interests in the property:
- (a) The Proprietor should have reasonable access to the use of the school for its own purposes when not in use for school purposes
 - (b) The Proprietor retains an interest in the use of the school property by third parties, particularly where such use might conflict with the Proprietor's /schools religious or philosophical character.

Enrolment

- 31 The maximum number of students who may be enrolled in the School is 100. The children of parents who, in the Proprietor's opinion, have a particular or general philosophical or religious connection with the School must be preferred to other children for enrolment at the School.
- 32 The School is not required to enrol, even when places are available, any student who does not have preferential enrolment at the School under section 442 of the Act.

Employees

- 33 Where any person employed at the School is paid (whether in whole or in part) out of money appropriated by Parliament:
- (a) the Proprietor agrees that it will not, directly or indirectly:
 - (i) pay that person any remuneration in connection with their role as an employee of the School additional to that provided for by the Act; or
 - (ii) grant or permit that person any condition of service more favourable than that permitted for a person employed in the same (or a materially equivalent) position in a State school that is not a State integrated school; and
- 34 An advertisement for the position of principal of the School must state that a willingness and ability to take part in the special character of the School is a condition of appointment to this position. Any person appointed as principal of the School must accept this requirement as a condition of the person's appointment and must accept and recognise a responsibility to maintain and preserve the special character of the School.
- 35 An advertisement for the position of class teacher at the School must state that a willingness and ability to take part in the special character of the School is a condition of appointment to this position. The Proprietor will give employment preference to teachers with Steiner training or experience. Any person appointed to the position of class teacher at the School must accept this requirement as a condition of the person's appointment and must accept and recognise a responsibility to maintain and preserve the special character of the School.
- 36 The Proprietor may employ any person for duties relating to the special character of the School such as woodwork, outdoor classroom, handwork, gardening, Bothma gym or eurythmy. The provisions of section 470(2) and (3) of the Act apply to that person's appointment.

Attendance dues

- 37 The Proprietor may enter into an agreement with parents (or other person/s with legal responsibility for the education of a child) that provides that the parents (or such other person/s) must pay attendance dues as a condition of the child's enrolment and attendance at the School.
- 38 Attendance dues must not exceed the rate from time to time approved by the Minister for the School.

General

Delegates

- 39 The Minister may appoint any person to undertake the administration of this Agreement on the Minister's behalf and to do all things under this Agreement that are expressed or implied as able to be done by the Minister. Any change to the person holding office as the Minister will not affect any appointment previously made, unless such appointment is subsequently revoked.

Assignment or transfer

- 40 The Proprietor will not assign any of its rights or transfer any of its obligations under this Agreement unless that assignment or transfer is permitted by (and will comply with) all laws and has first been approved in writing by the Minister.

No agency

- 41 The Proprietor is not a representative or an agent of any of the Minister, the Secretary or the Ministry and may not hold itself out otherwise to any person.

Privity

- 42 Except as expressly set out in this Agreement, nothing in this Agreement is intended to confer any right, benefit, privilege or obligation on any third party.

Amendment

- 43 The Parties may amend this Agreement by one or more Supplementary Agreements. Any amendment to this Agreement will be effective from the date a Supplementary Agreement is executed by both Parties.

Costs

- 44 Each Party will bear its own costs in the preparation of this Agreement and any Supplementary Agreement.

Good faith

- 45 Each Party agrees to act in good faith in its dealings with the other Party under this Agreement.

Precedence

- 46 On and after the Effective Date the School will be a State integrated school in terms of the Act and part of the State system of education in New Zealand. In the event of any inconsistency between the terms of this Agreement and the provisions of the Act, the provisions of the Act will prevail. Nothing in this Agreement overrides or excludes the application of the Act in any way, including as regards the exercise of any right, power or discretion that the Minister, the Secretary or the Ministry may have under the Act or that the Proprietor may have under the Act. The Minister may (but will not be obliged to) exercise any rights and powers conferred by this Agreement at the same time as, or at any time in addition to, the rights, powers and discretions given to the Minister, the Secretary and the Ministry (as the case may be) under the Act.

Notices

- 47 All notices that are required to be sent under this Agreement or the Act must be in writing and sent to the following addresses unless otherwise agreed in writing between the Parties. For the purposes of this clause, "in writing" includes by email.

- (a) All notices to the Minister must be sent to The Associate Deputy Secretary, Operational Delivery, Ministry of Education, PO Box 1666, Wellington, facsimile (04) 463 8252 or email: helen.hurst@education.govt.nz.
- (b) All notices to be sent to the Proprietor must be sent to proprietor@motueka.steiner.school.nz

Execution

Signed on the 22 day of May 2020 by:

Motueka Steiner School Proprietors Trust by :



Alistair Colin Knox Munro

in the presence of:

Name: Peter Russell Gurtlick

Occupation: Development Manager

Address:

(Town/city) Motueka

By signing this Agreement, each representative of the Proprietor confirms that s/he has the authority to sign for and on behalf of the Proprietor, and that the Proprietor is and will remain a body corporate with capacity to enter into this Agreement under s 421(3) of the Act.

Signed on the 17th day of June 20__ by:

Her Majesty the Queen in right of New Zealand, acting by and through the Minister of Education:



in the presence of:

Name: Alexandra Marett

Occupation: Ministerial Advisor

Address:

(Town/city) Office of Hon Chris Hipkins, 6.3 Executive Wing, Beehive, Wellington.



SCHEDULE 1: PROPRIETOR'S LAND

All the land, buildings and other improvements leased by the Proprietor at 165 Robinson Road, Lower Moutere, which is part of Lot 1 in DP396504 (record of Title 389392), having an area of approximately 5.67 Ha shown edged red on the plan in Schedule 2.

The Proprietor's land does not include:

- the Kindergarten area of approximately 0.13 Ha shown edged blue on the plan in Schedule 2.



RECORD OF TITLE UNDER LAND TRANSFER ACT 2017 FREEHOLD Search Copy



Identifier **389392**
Land Registration District **Nelson**
Date Issued 12 December 2007

Prior References

NL8C/1209

Estate	Fee Simple
Area	13.6000 hectares more or less
Legal Description	Lot 1 Deposited Plan 396504

Registered Owners

The Motueka Rudolf Steiner School Trust

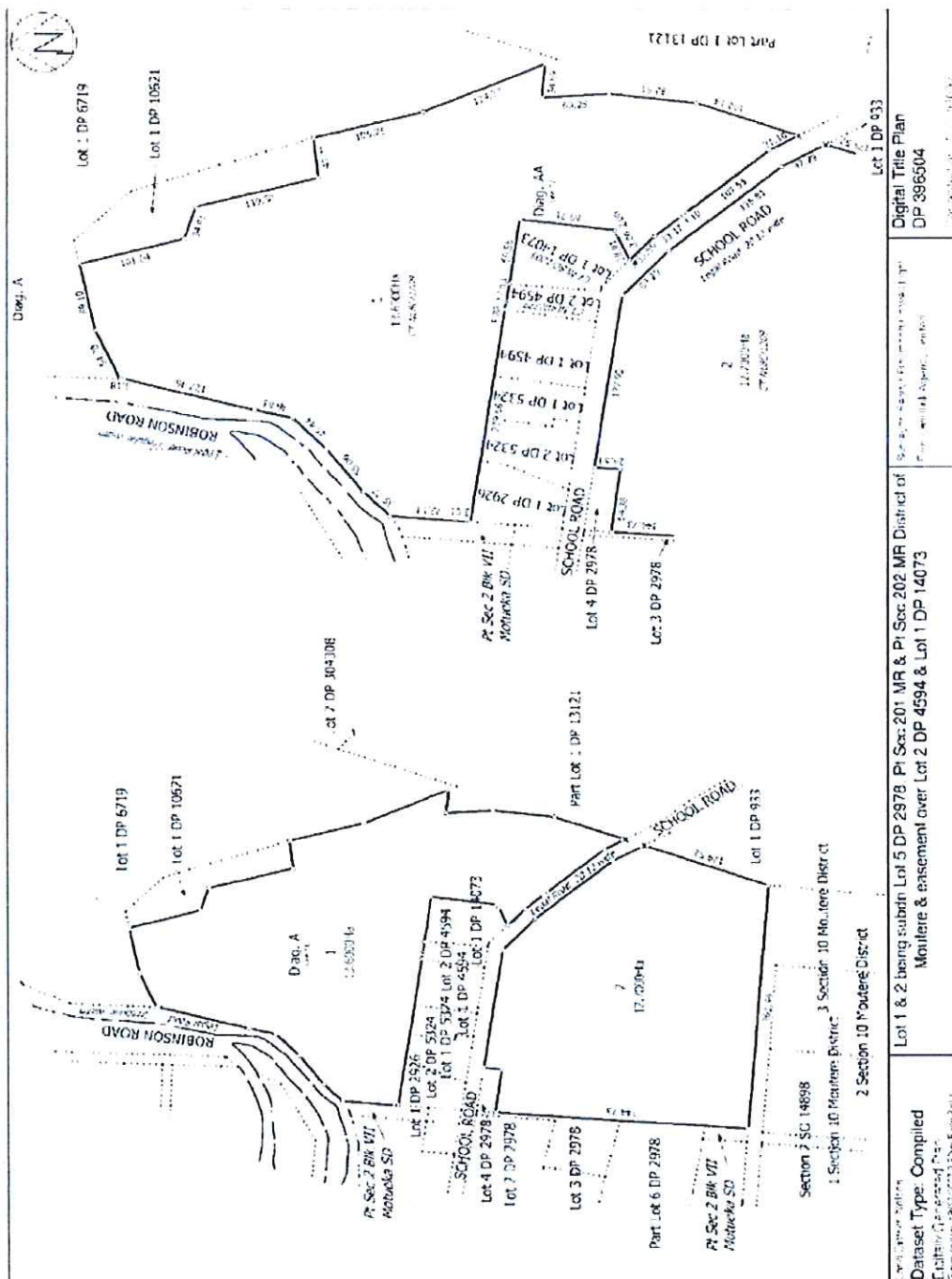
Interests

Subject to a right to convey water over part marked A and D on DP 396504 created by Easement Instrument 7653015.3 - 12.12.2007 at 9:00 am

Appurtenant hereto is a right to convey water created by Easement Instrument 7653015.3 - 12.12.2007 at 9:00 am

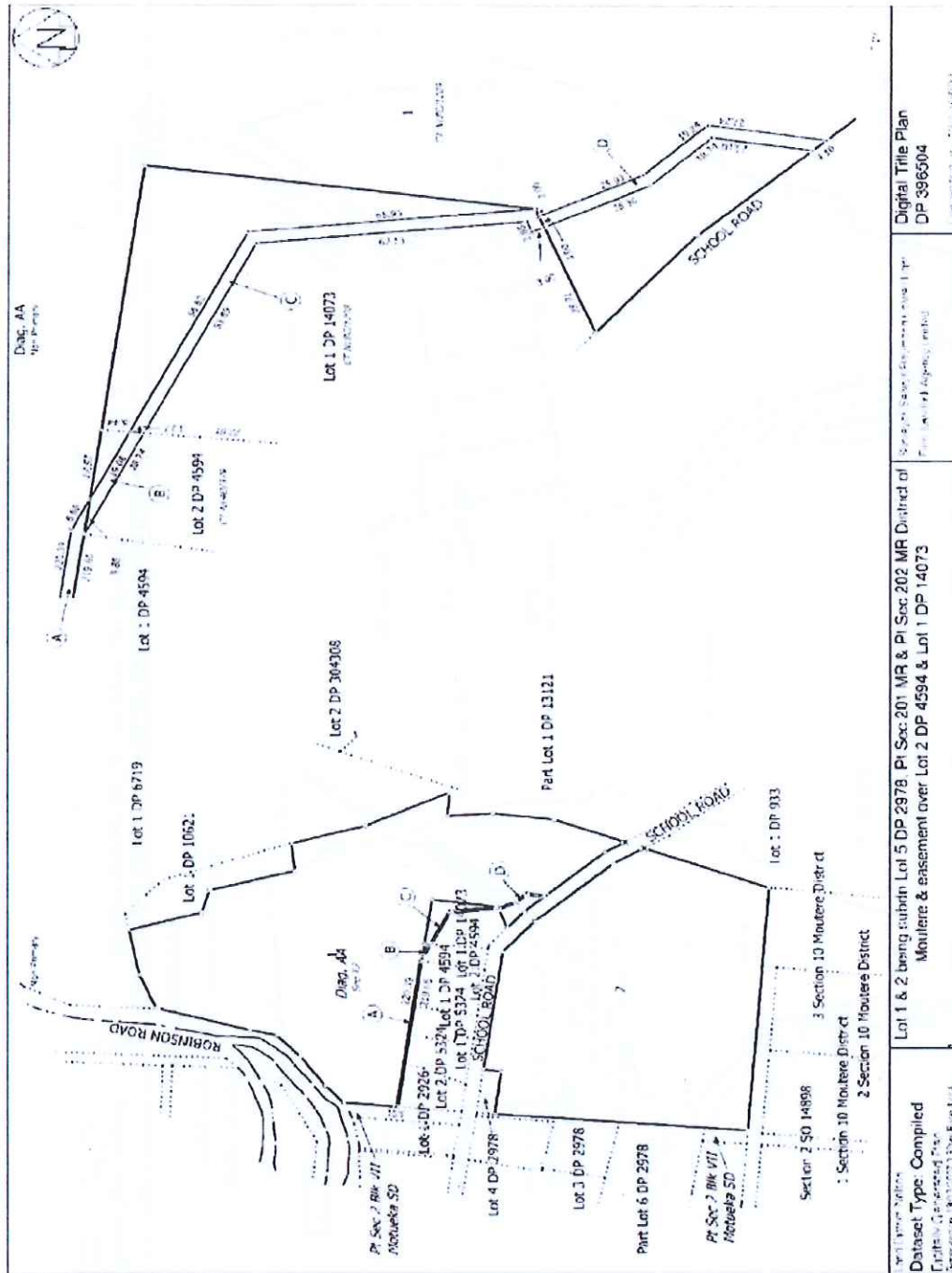
The easements created by Easement Instrument 7653015.3 are subject to Section 243 (a) Resource Management Act 1991

Subject to a right (in gross) to convey electricity and telecommunications over part marked A in favour of Network Tasman Limited created by Easement Instrument 11596338.1 - 17.12.2019 at 12:05 pm



Identifier

389392



Handwritten signature/initials

with $\gamma \in \mathbb{R}$ chosen so that $\gamma \leq \min_{i \in \mathcal{I}} \gamma_i$ and $\gamma \geq \max_{i \in \mathcal{I}} \gamma_i$. Then, the following holds:



SCHEDULE 3: MAINTENANCE FUNDING

Calculation of the Sum

1. The Sum will be calculated on or before 1 January of each year in accordance with the following formula:
 - (a) The depreciated value (or net carrying value) of the buildings comprising state schools as shown in the most recent Ministry of Education Annual Report (V) is multiplied by the Depreciation Rate (r).
 - (b) The figure thus obtained is divided by the total number of students enrolled in state schools as determined by the most recent actual rolls used for the purposes of operations funding in the year preceding that for which sum is being calculated (S), to give a per student amount.
 - (c) The per student amount is then multiplied by the number of students enrolled in the School as determined by the most recent actual roll used for the purposes of operations funding in the year preceding that for which the sum is being calculated (R) (which number must not exceed the maximum roll provided for in the Integration Agreement).
 - (d) Goods and Services Tax is then added to this figure (GST).

Paragraphs (a) to (d) are expressed in the following formula:

$$\frac{V \times r \times R}{S} + \text{GST} = \text{the Sum}$$

2. If it is not possible by 1 January in any year to calculate the Sum in accordance with clause 15 of this Agreement by using numbers and/or values from the immediately preceding year, the Sum shall be the Sum for that preceding year ("Deemed Sum").
3. If clause 2 of this Schedule applies and if the Deemed Sum has been paid in whole or in part in accordance with clause 15 of this Agreement the Minister shall calculate the Sum as soon as numbers and/or values are available for the preceding year in accordance with clause 1 (the sum so calculated being referred to as "the Revised Sum").



4. Subject to the provisions of clause 5 of this Schedule, in the event that the Revised Sum is more than the Deemed Sum the Minister shall pay the amount of that difference. If the Deemed Sum is more than the Revised Sum the Proprietor shall pay to the Minister the amount of that difference. In either case the payment will be taken into account in the instalments of the Sum paid in accordance with clause 17 of this Agreement.
5. If the Minister has in any year and for any reason paid the Proprietor more than the Proprietor is entitled to be paid under this Agreement, the Minister may at his or her election recover the overpayment by deducting it from any instalments of the Sum payable, in the current or any future year or years.
6. Where the Effective Date is later than 1 January then in the first year of the operation of this Agreement the Sum shall be deemed to be the amount of the remaining instalments of the Sum, calculated in accordance with this clause 1 of this Schedule for the whole year, payable for the period from the Effective Date to the end of that year



