



## **Briefing Note: Meeting with the Association of Proprietors of Integrated Schools, 7 June 2023**

<b>To:</b>	Hon Jan Tinetti, Minister of Education		
<b>Date:</b>	1 June 2023	<b>Priority:</b>	Medium
<b>Security Level:</b>	In Confidence	<b>METIS No:</b>	1309510
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<b>Messaging seen by Communications team:</b>	No	<b>Round Robin:</b>	No

### **Purpose of Paper**

This paper provides information to support your meeting with the Association of Proprietors of Integrated Schools (APIS) on Wednesday 7 June in your office.


### **Summary**

1. You are meeting: Dr Kevin Shore (Chief Executive Officer, APIS); Karen Raitt (Manager, Strategy, Projects and Policy, APIS); and Mark Larson (Chief Executive Officer, Association of Independent Schools New Zealand).
2. APIS has advised that it wishes to discuss with you:
  - a. Your decision to focus on literacy and numeracy and push back other workstreams;
  - b. Abundant Life School and the clarity of clause 13;
  - c. Policy Two funding for integrated school property;
  - d. Issues discussed regarding the EQI;
  - e. Awhi mai awhi atu (Counsellors in Schools) following Cyclone Gabrielle;
  - f. A media opinion piece on the funding of Catholic schools.

### **Proactive Release**

**Agree** that the Ministry of Education release this briefing once you have met with APIS, with the talking points withheld on the grounds that they are free and frank advice.

**Agree / Disagree**

  
Alanna Sullivan-Vaughan  
(Acting) General Manager  
Te Pou Kaupapahere | Policy  
01/06/2023

  
Hon Jan Tinetti  
Minister of Education  
06 / 06 / 2023

## Background

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1. In your last meeting with the Association of Proprietors of Integrated Schools (APIS) on 22 February you discussed the Equity Index (EQI) and funding for integrated schools in South Auckland, the provision of inclusive environments in integrated schools, and various matters raised in a briefing APIS had prepared for you.
2. Your office requested that we brief you for your next meeting with APIS, scheduled for 3.30–4.30pm, Wednesday 7 June. The following representatives are expected to attend (more details in Annex 1):
  - a. Dr Kevin Shore – Chief Executive Officer of APIS and the New Zealand Catholic Education Office (NZCEO).
  - b. Karen Raitt (Manager, Strategy, Projects and Policy, APIS and NZCEO).
  - c. Mark Larson (Chief Executive Officer, Association of Integrated Schools New Zealand (AIS)).
3. Dr Shore has provided an agenda for the next meeting as follows:
  - a. Decision to focus on literacy and numeracy and push back other workstreams.
  - b. Update on Abundant Life School Kaitia clarity of clause 13 – APIS working with MoE.
  - c. Policy Two Funding.
  - d. Update on issues discussed regarding the EQI.
  - e. Issue that arose re Cyclone Gabrielle with Awhi mai awhi atu not being available to state integrated schools.
  - f. Media article focused Catholic schools – opinion piece by Guy Gifford.

## Information to support your discussion of the agenda items

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### Changes to curriculum reform timings

4. We are working on major reforms of the National Curriculum and a Common Practice Model to lift the quality of numeracy, literacy, and pāngarau teaching. The National Certificates of Educational Achievement (NCEA) are undergoing their first major changes since their introduction between 2002 and 2004. The changes aim to provide better, more equitable outcomes for all ākonga.
5. Sector feedback has shown that kaiako and leaders need more time to confidently implement the NCEA and curriculum changes while also improving teaching practice. Accordingly, on 19 April you announced a revised timeline for delivering the new curriculum and assessment programmes. The new programme timeframes will support improved alignment between the national curriculum and the NCEA assessment changes already in development.
6. For kura using the redesigned *Te Marautanga o Aotearoa*:
  - a. Full implementation is being deferred from 2026 to the beginning of 2027.
  - b. The exceptions are the Tirewa Mātāmua for Pāngarau and Te Reo Māori. These are to be implemented sooner and will align to the Ako Framework which is in development to support learning and teaching of te reo mātātini and pāngarau.
  - c. The redesigned curriculum, including related resources and supports, will be

developed and released as per existing timeframes.

- d. We want kura to engage with the curriculum changes at their own pace. Kura can implement changes earlier than required if they feel comfortable.

7. For schools using *the New Zealand Curriculum*:

- a. Implementation of the full refreshed New Zealand Curriculum will not be required until the beginning of 2027. It will be ready for use in 2026.
- b. The exceptions are the Maths and English learning areas, which are to be released on 15 May and implemented sooner than other learning areas to align with the Common Practice Model (in June we will provide further advice on their implementation timeline).
- c. Design of the refreshed curriculum learning areas will be developed and released as originally planned.
- d. Schools are able to engage with the curriculum changes at their own pace. They are still able to implement changes earlier than required if they feel ready.

8. For NCEA changes:

- a. The new Level 1 achievement standards will be fully implemented in 2024 as planned.
- b. Level 2 will be implemented in 2026 – instead of 2025. Level 3 will be implemented in 2027 – instead of 2026.
- c. A mandatory 20-credit literacy, numeracy, te reo matatini and pāngarau co-requisite for students to be awarded an NCEA will be introduced in 2024.
- d. In 2024 and 2025, there will be a transition period where students may achieve the co-requisite via either the common assessment activity or a list of literacy and numeracy rich standards. These assessments will draw on new NCEA Level 1 achievement standards for English, Mathematics and Statistics, te reo matatini and pāngarau.

- 9. APIS wishes to discuss these changes of focus and timelines. As noted above, the changes respond to sector concerns and enable greater alignment of the changes, but schools and kura may implement the curriculum changes faster if they choose to.

**Kaitia Abundant Life School and the clarity of clause 13**

- 10. As noted in previous advice, the proprietor of Kaitia Abundant Life School, an integrated school in Northland, decided in 2022 to cancel the school's integration agreement and close. This is planned to occur at the end of Term 2 2023.

- 11. Schedule 6 of the Education and Training Act 2020 provides three ways for integration agreements to be cancelled:

- a. Initiated by the Minister (clause 12).
- b. Initiated by the proprietor (clause 13)
- c. Agreement between the Minister and the proprietor (clause 14).

12. Almost all processes to cancel a school's integration agreement have been under clause 14.<sup>1</sup> Kaitiā Abundant Life School initially proposed cancellation under clause 13. There is not an established process for implementing this clause, and the Ministry and the proprietor had different interpretations of it. After discussions the proprietor agreed to cancel by mutual agreement (a process led by the Ministry, and currently underway).
13. In discussions with APIS we confirmed that we have not set out an agreed process for cancelling under clause 13, as this is a rare occurrence. We are now working with APIS on developing guidance so that, should a proprietor wish to initiate the cancellation of their school's integration agreement, they, the Ministry and Minister are aware of the process and each party's role in it.
14. On a related matter, ERO's report on Bethlehem College has not yet been published.

### **Property funding for integrated schools**

#### ***Policy Two funding***

15. The Government gives proprietors of integrated schools 'Policy One' funding for capital maintenance and modernisation projects (\$91.8m in 2022/23), to keep existing integrated school property in a state of repair comparable with that of state schools.
16. 'Policy Two' funding (\$1.4m in 2022/23) is discretionary funding of up to 85% of the construction costs of new classrooms or schools. This rate reflects the fact that the proprietor will own the property. 'Policy Two' funding is only provided if it avoids having to provide extra capacity in state schools. 'Policy Two' funding cannot be used for non-integrated space, including hostels or other residential accommodation.
17. Policy Two funding depends on Ministerial approval and the Budget process, in which preference is given to growth in state schools. No Policy Two funding is available from July 2023.

#### ***Essential Property Maintenance Funding***

18. After state integrated schools were excluded from the 2019 School Investment Package, Budget 2021 allocated \$52.8 million over 2021/22 and 2022/23 to fund essential upgrades to improve learning environments at state-integrated schools. This time-limited funding has been fully allocated by APIS on the Ministry's behalf.

#### ***Budget 2023***

19. For state integrated schools, no additional property funding (whether for maintenance (Policy One), growth (Policy Two), or cyclone recovery) was approved in Budget 2023. Some integrated schools experienced property damage from Cyclone Gabrielle. This is the responsibility of the proprietor, who is required to have insurance.
20. The Budget provided \$26 million for immediate response work and \$75.7 million for repair and rebuild of severely affected state schools.
21. APIS may raise questions as to why further property support was not available in Budget 2023 and the possibility of support in future Budget rounds. Budget 2023 did not include initiatives specifically targeted to state-integrated schools, but state-integrated schools received the 3.5% cost adjustment to the operational grant and Policy One funding is

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<sup>1</sup> The only cancellation initiated by the Minister was for Turakina Māori Girls' College, in 2016.

recalculated annually based on changes in state school valuations (it increased by around 16% per student in 2023).

### **The Equity Index and operational funding for state integrated schools**

22. Our briefing for your last meeting with APIS examined the impacts of moving to the Equity Index (EQI) on state and state integrated schools in South Auckland. The EQI is a more accurate and up-to-date measure of socioeconomic barriers than deciles, so some redistribution of equity-weighted funding was inevitable. Updating deciles based on the 2018 census would also have caused a redistribution of funding.
23. On 13 March we met with you and discussed:
  - a. the shifts in funding due to the change from deciles to the EQI;
  - b. why the EQI is a more accurate and precise indicator of social disadvantage;
  - c. how deciles likely overstated the relative disadvantage in South Auckland integrated schools, when compared to other schools;
  - d. the funding that is easing the transition to the EQI for affected schools; and
  - e. how per-student equity funding for Pacific learners has improved, and is higher than the average at national, regional and Auckland sub-regional levels.
24. The main drivers of the different effects of adopting the EQI on state and state integrated schools in South Auckland are:
  - a. demographic change: deciles were based on outdated 2013 Census data while the EQI is much more up-to-date (and will be updated annually);
  - b. deciles were based on the Census neighbourhood meshblocks where students resided; the EQI is based on the students at the school and their families;
  - c. the cost of attendance dues (despite some waivers) and the special character of state integrated schools causes these schools to draw their students from a larger catchment area that can be somewhat less like their local community;
  - d. the 37 variables in the EQI are selected and weighted based on their relationships with NCEA Level 1 and 2 achievement, and cover many more factors than the five equal-weighted variables used for deciles;
  - e. deciles treated young people over the age of 10 sharing a room as household 'crowding' – this likely overstated crowding in some areas, and a suitable annual measure, if available, would probably not significantly alter the EQI given its correlation with the variables already included;
  - f. instead of 18 decile funding steps the EQI ranges from 344 to 569, allowing more accurate matching of funding to the socioeconomic barriers facing students.
25. Transition funding is being provided to schools that were forecast to have less funding due to the shift to the EQI. Schools are being fully compensated for any forecast net reduction in equity-weighted and isolation funding in 2023. This includes around 26% of integrated schools nationally (the remainder have a forecast net increase). From 2024, any forecast net reduction in this funding is being limited to a maximum of 5% of a school's 2022 operating grant each year until the school reaches its new funding level. The Ministry's financial advisors are available to provide advice to schools on how to manage the transition.

## **Cyclone Gabrielle and the provision of Awhi mai awhi atu | Counselling in Schools in integrated schools**

26. Awhi mai awhi atu | Counselling in Schools (CiS) is a pilot initiative funded through a Budget 2020 package of support for learner and educator wellbeing, responding to COVID-19. It funds community providers to provide counsellors to help kaiako and kaiāwhina care for ākonga and make school a place of shelter and connection as well as learning. CiS is intended for state and state-integrated primary and intermediate schools and smaller secondary or area schools.<sup>2</sup>
27. Schools work with their community providers and the Ministry to shape support that suits their school environments, cultures, ākonga and whānau. Examples include:
  - a. a counsellor working one-on-one with ākonga;
  - b. music, art, equine therapies with groups of ākonga;
  - c. wellbeing initiatives working through the school curriculum and culture.
28. The funding for CiS is currently limited to \$11.074 million per year. ERO is evaluating the initiative to find out whether it is having the desired impact on learner wellbeing and engagement outcomes and whether it is sustainable and scalable. This evaluation is being used to inform operational improvements and will also inform future policy advice on counselling in schools.
29. The support is available in schools the Ministry considers have the greatest need. It operates in eight regions (two other regions were judged to be receiving comparable support from the Ministry of Health's Mana ake mental health and wellbeing initiative). Regional Lead Advisors Wellbeing identify and work with suitable schools to confirm their interest, suitability and involvement. Schools are selected for CiS based mainly on:
  - a. having an EQI value of 500 or more (higher EQI values indicate more socio-economic barriers to achievement among the school's ākonga);
  - b. existing support including guidance staffing and Social Workers in Schools (such services may be sufficient given the limited number of counsellors available, or they may be a good complement for CiS support);
  - c. the availability of a suitably qualified and experienced counselling practitioner the school sees as a good 'fit' (this can be a challenge given the nationwide shortage of counsellors and, recently, the impact of Cyclone Gabrielle on counsellors themselves).
30. Other factors that regions may consider are:
  - a. high levels of non-attendance and/or non-enrolments;
  - b. significant levels of emergency housing in the local area;
  - c. the NZ Index of Deprivation;
  - d. wider community events such as a weather event or natural disaster location;
  - e. other regional indications of need.

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<sup>2</sup> Primary schools do not receive guidance staffing. Larger secondary and area schools received an increase in guidance staffing through the Wellbeing package.

31. As the number of hours of counselling required by each school has become clearer it has become possible to expand participation within the available funding. The number of participating schools has grown from an initial 140 to over 200, with more than 40 providers.
32. Only five of the participating schools are state integrated. This is due to there being many more state schools than integrated schools nationally, and a much higher proportion of them (around 29% compared to around 5% of integrated schools) having an EQI value of 500 or more.<sup>3</sup>
33. The Ministry has worked with Te Whatu Ora to provide a psycho-social response for those impacted by Cyclone Gabrielle. The selection of schools for CiS was made more flexible in affected regions. Regional Lead Advisors are not aware of an increase in demand from integrated schools in these regions but, if requests are received, Lead Advisors will work with them to discuss their needs, whether CiS is appropriate for their ākonga and whether there is a suitable locally based provider.

#### **Guy Gifford opinion piece on funding for integrated schools**

34. APIS wishes to discuss an opinion piece by Guy Gifford, a former teacher in integrated and state schools, published in the New Zealand Herald on 27 March.

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These donations are voluntary, eligible for a donations rebate for parents, and free of GST. Mr Gifford does not mention the lower level of property funding for integrated schools, or attendance dues, which are mandatory, subject to GST, and not eligible for a donations rebate. In the case of Waikato Diocesan School for Girls, they amount to \$431.24.

36. Around 57% of integrated schools (91% of those eligible) have joined the donations scheme, and therefore do not request donations. Based on several integrated schools, requested donations do not always exceed attendance dues and, where they do, the amount requested is rarely as high as in Mr Gifford's example. In 2021, total reported donations to integrated schools were around 2.4 times total reported fees.<sup>4</sup>
37. While integrated schools have a lower average EQI value than state schools, they serve students from many backgrounds and add capacity, diversity and responsiveness to the school system. The average EQI value for integrated schools is around 432 while the average for state schools is around 467 – a material but not overwhelming difference.
38. We expect APIS to reject Mr Gifford's characterisation of the funding of integrated schools and highlight that many integrated schools waive attendance dues or provide scholarships for students from less wealthy families.

#### **Annexes**

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Annex 1: Attendees

Annex 2: Talking points

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<sup>3</sup> These percentages exclude attached units, special schools and Te Aho o Te Kura Pounamu.

<sup>4</sup> Not including fees for extracurricular activities.



## **Annex 1: Attendees**

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### **APIS**

The Association of Proprietors of Integrated Schools (APIS) brings together the proprietors of 335 integrated schools (one further secondary school opens in 2024). Proprietors of five small state integrated schools do not belong to APIS. APIS recently provided you with a briefing that provides further information about the Association and its concerns.

### **NZCEO**

The NZCEO describes itself as “a catalyst engaging Catholic schools to become leaders in New Zealand education, delivering outcomes in the spirit of the Gospel”. It works on national issues, mainly in relation to national and operational policy for schools.

### **Association of Integrated Schools New Zealand (AIS)**

The Association of Integrated Schools New Zealand is a support and networking organisation for non-Catholic state integrated schools. It was set up in 1982 so that all proprietors, irrespective of their religious or philosophical position, could work together in their relationship with government and government agencies.

#### **Dr Kevin Shore - APIS**

Dr Shore is the Chief Executive of both APIS and NZCEO. He has been in this position since October 2020. Before that he was principal of St Peter's College in Palmerston North and was an education leader for 30 years in both state and integrated schools. Kevin has a PhD in Education and a Masters' degree in Educational Administration.

#### **Karen Raitt - APIS**


Karen Raitt is the Deputy Chief Executive, Manager of Policy, Projects, Strategy and Governance. She has worked at NZCEO and APIS for three years after gaining extensive experience working for NZSTA. She has a business management background and strengths in project management and governance.

#### **Mark Larson - AIS**


Mark Larson has had a long career in and with schools. He is Chief Executive Officer of the Association of Integrated Schools, in which capacity he is attending this meeting. He is Chief Executive of the Christian Schools Trust, Chair of the Board of Rolleston Christian School, past principal of Middleton Grange School and past deputy principal of Papanui High School.




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