

Appendix B – Summary of Correspondence

Correspondence between the Ministry of Education and Hereworth School about their application to become state integrated and co-educational began in March 2021. Below, I have provided you with the details of the school's requests for information to support their application, and the advice the Ministry provided in response.

Date	Subject of Query	Advice provided	Links provided
March 2021	Funding - Including attendance dues, staffing entitlement,	<ul style="list-style-type: none"> • Advised that preparation of Budget 2022 is to be prepared on the basis that the school is integrated and should include the proprietor donation. • Provided school with estimated calculations for staffing and funding to include with their Budget planning based on predictions of what the October roll will be. • Advised that attendance dues can be requested and collected by either the proprietor or the school. Fundraising for capital asset purchases should be collected under the name of the proprietor. • Provided advice to the school about the allocation of Technology Teachers and a link to further information on this subject. • Provided information about the allocation of full-time teacher equivalents, and that whilst the actual revenue and cost of the teachers is recorded in the school accounts no cash goes through the school. Overuse of entitlement is charged to the school at \$80,500 pro-rata for 2021, irrespective of what the teachers earn. • Advised that management staffing depends on the size of the school and is calculated as base management or professional leadership staffing plus the roll-generated management staffing. • Advised that the staffing entitlement is for teachers only, and that other staff (including administrative staff) are paid from the bulk grant or operations funding. • We were provided with the last five years' financial accounts to support the school's application. • Provided links to: 	<ul style="list-style-type: none"> • https://education.govt.nz/assets/Documents/School/Running-a-school/School-finances/Attendance-Dues-Guidance-Final.doc • https://www.education.govt.nz/assets/Documents/School/Running-a-school/School-finances/Attendance-Dues-Data-Model.xlsx • https://www.education.govt.nz/school/people-and-employment/principals-and-teachers/primary-principals/#sh-principals%20pay • https://www.education.govt.nz/school/funding-and-financials/resourcing/school-staffing/ • https://www.education.govt.nz/school/funding-and-financials/school-finances/ • https://www.fundingcalc.minedu.govt.nz/ • https://www.educationcounts.govt.nz/directories/list-of-nz-schools • https://www.education.govt.nz/school/funding-and-financials/resourcing/ • https://www.education.govt.nz/school/funding-and-financials/resourcing/technology-provision-for-year-7-and-8-students/

		<ul style="list-style-type: none"> ○ information required to calculate Attendance Dues ○ model for calculating attendance dues data ○ guidance on principals pay ○ guidance for calculating staffing and funding estimates ○ information about staffing salary unit entitlements. 	<ul style="list-style-type: none"> • https://www.education.govt.nz/school/funding-and-financials/resourcing/school-staffing/banking-staffing/ • https://www.education.govt.nz/school/funding-and-financials/resourcing/school-staffing/entitlement-staffing/#Mgmt • https://www.education.govt.nz/school/funding-and-financials/resourcing/principals-salary-grades/ • https://www.education.govt.nz/school/funding-and-financials/resourcing/school-staffing/entitlement-staffing/#Salary
March 2021	School Transport	<ul style="list-style-type: none"> • Provided links to: <ul style="list-style-type: none"> ○ information about school bus procurement ○ additional information about school transport. 	<ul style="list-style-type: none"> • https://www.education.govt.nz/school/property-and-transport/suppliers/school-bus-procurement/ • https://www.education.govt.nz/school/property-and-transport/transport/ • https://www.education.govt.nz/school/property-and-transport/transport/sta-eligibility/
March 2021	Co-education	<ul style="list-style-type: none"> • Provided advice to the school about becoming co-educational and how that will affect their application to become state-integrated. • We were provided with information to demonstrate the teachers' readiness to teach girls to support their application. 	
March 2021	Property	<ul style="list-style-type: none"> • Advised the school about the Property Maintenance Grant (PMG), and what it can be used for. • Advised the school about Policy One Funding that is paid to the proprietor to pay for capital work over \$5,000 to create a new asset, improve or replace an existing asset. • We advised that the school need to undertake a Building Condition Assessment to support their application to become integrated, which would identify which buildings could be considered for integration and which buildings would require 	<ul style="list-style-type: none"> • https://www.education.govt.nz/school/funding-and-financials/funding/property-maintenance-grant/ • https://www.education.govt.nz/school/funding-and-financials/funding/capital-funding-for-integrated-schools/policy-one-funding-for-capital-work/

		<p>upgrades. The school were provided with a Ministry contact person for this assessment.</p> <ul style="list-style-type: none"> We advised that the amount of integrated buildings will be calculated based on the number of pupils and the Ministry's entitlement to space, and that Hereworth may have excess space that would not be integrated compared to state school entitlements. 	<ul style="list-style-type: none"> https://www.education.govt.nz/school/funding-and-financials/funding/capital-funding-for-integrated-schools/
March 2021	Association of Integrated Schools NZ	<ul style="list-style-type: none"> Provided links to the Association of Integrated Schools NZ guidance that is available online. 	<ul style="list-style-type: none"> http://www.aisnz.org.nz/wp-content/uploads/2020/02/AIS_Proprietor-of-State-Integrated-School-eBook-2020.pdf http://www.aisnz.org.nz/wp-content/uploads/2016/11/AIS-Financial-Administration-Manual-NEW-2.pdf http://www.aisnz.org.nz/wp-content/uploads/2016/11/AISA04-Draft-MOU-between-Proprietor-BOT.pdf
April 2021	Process of submitting application	<ul style="list-style-type: none"> We advised that the integration application is submitted through the Association of Proprietors of Integrated Schools (APIS) in the first instance and forwarded to the Ministry so that we are aware it has been submitted. 	
April 2021	Release of Information	<ul style="list-style-type: none"> We provided advice that information provided to the Ministry is covered by the Official Information Act 1982. We were provided with a copy of their media statement ahead of its public release. We were advised that the school were intending to speak with the principals of neighbouring schools about their application. 	<ul style="list-style-type: none"> https://www.hereworth.school.nz/asset/downloadasset?id=81d325ec-de29-4569-b8ec-e2900cae0711