



## Education Report: Guidance for the school donations scheme

<b>To:</b>	Hon Chris Hipkins, Minister of Education		
<b>Date:</b>	18 July 2019	<b>Priority:</b>	High
<b>Security Level:</b>	In Confidence	<b>METIS No:</b>	1198999
<b>Drafter:</b>	Jann Marshall	<b>DDI:</b>	s 9(2)(a)
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<b>Messaging seen by Communications team:</b>	No	<b>Round Robin:</b>	No

### Purpose of Report

This report provides you with the third draft of the donations scheme guidance following consultation with families and whānau on version one, and feedback from your office on version two (provided on 17 July 2019). This report seeks your agreement to send the guidance to schools as a basis for their decisions to opt in or out of the scheme.

### Summary

1. This report outlines the information produced by the Ministry relating to guidelines for the school donations scheme.
2. The first version of the draft guidance documents was sent to you on 16 July as part of the full school donations information pack.
3. To ensure the guidance was clear and fit for purpose, we undertook consultation at national and regional levels. Feedback indicated more clarity of information was needed and we updated the guidance accordingly.
4. Since the initial draft was completed on 21 June, you have made a decision to exempt school camps so Boards of schools and kura that opt into the scheme can still ask families and whānau for donations towards school camps. This is the only substantive change to the guidance.
5. There were wide ranging requests for information for families and whānau that was clear and easily understood. We prepared draft guidance for families and whānau about the donations scheme that we took out to three communities where we anticipated they would be representative of a range of families and whānau so that we could test the content and presentation for readability and understanding.

6. Feedback received from the consultation with families and whānau in the three communities indicated that we needed to further simplify the information by reducing the text and providing examples for families and whānau about what they can and can't be charged for.
7. We provided version two of the guidance to your office on 17 July 2019. We received feedback from your office on 18 July 2019, and we have subsequently added some items (for example, school balls) to the guidance for boards of trustees.
8. We are planning to release the next draft of the guidance in the 12 August School Bulletin, to give schools an opportunity to consult with their communities before deciding whether or not to opt in to the scheme.
9. Schools must advise us that they have decided to opt in to the scheme by 14 November 2019 to receive the funding on 3 January 2020, as part of their first funding drop.

### Recommended Actions

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The Ministry of Education recommends you:

- a. **agree** that the draft guidance for school donations be released in the 12 August School Bulletin, as a basis for their decisions to opt in or out of the scheme; and

Agree / Disagree

- b. **proactively release** this report once the Education (School Donations) Amendment Bill has been passed.

Release / Not release

  
Katrina Casey  
Deputy Secretary  
Sector Enablement and Support

18 July 2019

  
Hon Chris Hipkins  
Minister of Education

— / — / —

*Please do one more round of consultation with  
key sector leaders and groups before publication  
eg NZPF, SPANZ, NZSTA, IPTA, NZEI etc.*

## Background

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1. This report covers the process for developing and consulting on the draft guidance for the school donations scheme, announced as part of Budget 2019/20. It also provides you with the second draft of the donations scheme guidance, which incorporates consultation feedback.

## Preparation of guidance for schools

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2. In June 2019, the Ministry prepared two sets of draft guidance for schools:
  - Draft guidance for decile 1-7 schools choosing to opt in to the Donations Scheme
  - Draft guidance for decile 8-10 schools and schools choosing not to opt in to the Donations Scheme.

## National consultation on initial two sets of draft guidance for the school donations scheme

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3. The Ministry undertook consultation on the two sets of draft guidance to ensure they were clear, fit for purpose, and easily understood by schools.
4. Both sets of draft guidance were circulated to representatives of all peak education bodies on 21 June, in advance of a sector working group meeting on 27 June. Participants at the sector working group meeting Thursday 27 June were:
  - New Zealand Association of Intermediate and Middle Schools
  - New Zealand School Trustees Association
  - Association of Proprietors of Integrated Schools
  - New Zealand Educational Institute - Te Riu Roa
  - New Zealand Principals' Federation
  - Equity Sector Reference Group
  - Secondary Principals' Association of New Zealand
  - School Business Managers' Association
  - New Zealand Area Schools Association.
5. The following peak body representatives received the draft sets of guidance on 21 June but were unable to attend the 27 June meeting:
  - Post Primary Teachers Association
  - Te Rūnanga Nui o Ngā Kura Kaupapa Māori o Aotearoa
  - Ngā Kura a Iwi
  - Sector manager - Schools, Office of the Auditor-General
  - Special Education Principals' Association of New Zealand.

### Regional consultation

6. On 21 June, Directors of Education were provided with the draft guidance to enable them to consult with key groups in their regions and they took the opportunity to engage with principals, board chairs, families and whānau and school staff through targeted meetings, as part of their regular visits to schools, or at community or sector meetings. Consultation occurred differently in each region, depending on timeframes and other considerations.

### Feedback on draft sets of guidance for schools

7. We received feedback in a number of ways; through face to face conversations and via email returns. The feedback was based on the documents that were created and distributed for consultation prior to your decision to create an exemption for school camp costs, which was communicated to us at the Agency meeting on 1 July.
8. At the sector working group meeting on 27 June we discussed the draft guidance in detail. The sector representatives talked about the current operation in schools and that highlighted areas where boards might need to review inappropriate existing practice.
9. The working group were particularly interested in clarifying that the \$150 discretionary grant was GST exclusive, as this amount would make a significant difference to whether a school opted in to the scheme.
10. We made it clear at the sector working group meeting on 27 June that the guidelines are subject to change as the Education (School Donations) Amendment Bill progresses, and any guidelines will not be final until the legislation is passed.

### Specific feedback on the guidance for schools documents

11. The feedback received was that in general, the draft guidance is useful. Although the overwhelming feedback was that guidance for families and whānau was needed. There was some confusion about a few key areas listed below. Themes arising in the feedback on the guidance document for schools focused on:
  - **Camps.** Schools didn't clearly understand what they could ask for and why. There was also confusion about how "camps" differ from "trips", and where Education Outside the Classroom and physical education activities fit in terms of the requirements. We have since modified the documents to clarify the position.
  - **Curriculum vs non-curriculum.** This distinction wasn't clearly understood. We have provided specific examples to help clarify understanding.
  - **Fees and charges.** This distinction wasn't clearly understood. We have provided specific examples to help clarify understanding.
  - **Stationery.** There was confusion around why families and whānau were expected to purchase stationery, when it could be argued as being essential to children's participation in curriculum activities. We have provided specific examples to help clarify understanding.
  - **Uniforms.** Again, people were confused about why a school can require students to wear a uniform when it is not required for curriculum learning. There was also concern from some rural schools that families and whānau had to purchase uniforms from the school, and had no choice to purchase elsewhere. We have provided specific examples to help clarify understanding.



- **Alumni and other groups.** We received a number of questions around the status of these groups, and whether they could continue their activities if their associated school opts in to the donations scheme. We have clarified this in the guidance documentation.
- **Sports teams and cultural groups.** There was no clear understanding around whether sports teams and cultural groups could charge fees if their school opts in to the donations scheme. We have provided specific examples to help clarify understanding
- **Accessibility for families and whānau.** Some people did not think the draft guidance would be sufficiently accessible for families and whānau, suggesting a simplified version, possibly a flowchart, might be more useful.

### Preparation of new guidance for families and whānau

12. After the feedback was received from the sector working group and the regions, we identified a need to create guidance for families and whānau to help them understand the implications for them, what they needed to pay for and the items that the school could not compel them to pay for.
13. We identified a number of ways that we could further consult with families and whānau to ensure that we had reached out to as many parent groups as possible.
14. We conducted on-the-ground consultation on the draft guidance for families and whānau during the first week of the July school holidays. Our staff visited several locations likely to attract families and whānau during holiday time (e.g. swimming pools and community programmes), and collected feedback from families and whānau.

### **Feedback on the guidance from families and whānau**

15. Families and whānau' feedback was mostly positive and included the following suggestions for improvement :
  - There is too much information - use fewer words, and focus on key words, using pictures where possible.
  - Families and whānau want clear information around school trips eg what they have to pay for and what the school should be paying for.
16. In addition to providing feedback on the guidance, families and whānau were also interested in whether the funding would be specifically used to support their child or pooled for the school. We have not addressed every question raised but have provided contact details for questions on the guidance document.
17. We have made sure the draft guidance is accessible to families and whānau, taking into account the feedback we received. We have included a table of specific examples on the reverse of the draft parent guidance document.

### Draft guidance for the school donations scheme

18. As a result of the feedback we have not reproduced the written guidelines as this was seen as a duplication of the material included in the following documents.

19. The final sets of draft guidance has been prepared as a result of the consultation to assist people to understand donations in general and the donations scheme in particular.
- Families and whānau guide
  - Draft guidance for boards of trustees of decile 1-7 schools and kura choosing to opt in to the Donations Scheme
  - Draft guidance for boards of trustees of decile 8-10 schools and kura, and schools and kura choosing not to opt in to the Donations Scheme.
20. Once you agree to the release of these documents they will be produced to a professional standard to address the limitations of our current software and we will investigate the translation of this material into te reo Māori and other languages as well as versions of the guidance for state, state integrated and kura.
21. These are attached at Annex 1.

### Next steps

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22. We are planning to release the draft guidance to schools in the 12 August School Bulletin.
23. Decile 1-7 schools and kura will need to notify us by 14 November 2019, through an online form if they are opting in to the Donations scheme for the 2020 school year. Decile 1-7 schools and kura that choose not to participate will not need to take any action.
24. The guidance for schools and kura that opt in to the scheme will remain draft until the Bill has been passed. When the Bill passes, we will update the guidance with the final requirements.

### Proactive release

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25. We recommend that this briefing is proactively released once the Education (School Donations) Amendment Bill has been passed and the guidance has been finalised. Any information that might need to be withheld will be redacted in accordance with the provision of the Official Information Act 1982.

### Annex

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#### Annex 1: Draft Guidance

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2019 17 July Combined Draft Donations Scheme documents:

- Families and whānau guide
- Draft guidance for boards of trustees of decile 1-7 schools and kura choosing to opt in to the Donations Scheme
- Draft guidance for boards of trustees of decile 8-10 schools and kura, and schools and kura choosing not to opt in to the Donations Scheme.