

Education (ACE) Curriculum has been chosen as the delivery method for English, Mathematics and Science with all other subjects being delivered through the New Zealand Curriculum.

5.2.1 Priority Learner Groups:

Māori	110
Pasifika	0
Low socio economic	0
Special Education	0

5.2.2 Educational Track Record of the Sponsor:

Nga Kakano o te Kaihanga Trust's proposal states that the Trust has successfully met the objectives of the Trust since its inception in 1997. The Trust seeks continuous improvement and betterment of its operations and staff through the provision of quality directorship from the Board of Trustees

The Trust has developed integral partnerships within the West Auckland area as well as establishing strong relationships within the community of Waitakere

The Trust places great emphasis on ensuring Quality Management Systems are in place, reviewed and adapted accordingly, this is in-part achieved through the employment of teaching staff with over 20 years of experience achieving excellence in education.

5.3 Due Diligence: Review of Applicant Organisation

Section	Subsection	RAG	Comment
Organisational profile	Overall	Green	Registered Charitable Trust
	Year established		1997
	No of Staff		6
	No of Locations		1
Company Overview	Overall	Green	The Trust has operated a composite Christian school in West Auckland for 17 years.
Commitments	Overall	Green	School
Probity	Overall	Green	Nothing of concern noted.
Nominated Partners	Overall	Green	No subcontractors noted. s 9(2)(b)(ii) OIA
Financial Summary	Overall	Red	[REDACTED] Numbers provided are inconsistent with that summarised in application. Does not demonstrate capacity to manage proposed funding s 9(2)(b)(ii) OIA
	Accounts provided		[REDACTED]
Quality Assurance	Overall	Amber	They do not have any QA frameworks in place though they do received services from organisations who meet NZQA standards.*
Health and Safety	Overall	Amber	Yes*
	Written EHS Policy		Yes*
	Formal EHS training		No*

	Emergency Procedures plans		Yes*
Referees	Overall	Green	National Party, Tau Henare; Māori Womens Welfare League, Denise Ewe; Massey High School, Bruce Ritchie
	No of Referees provided		3

*Will form part of the contract negotiation if successful

5.4 Analysis of Application

Strengths	<p>The mission statement is clearly set out and puts forward the view that provision for Māori students in West Auckland is wanting. A clear and aspirational focus on achieving educational success for Māori students has been presented.</p> <p>Generally-strong plans to support the welfare and wellbeing of vulnerable students, and an effective wrap-around care programme.</p>
Weaknesses	<p>Did not present a clear, evidence-based rationale for establishing a Partnership School in this area. It was also not clear if the partnership School would be in addition to the existing private school or replace the existing private school.</p> <p>Aspects of the educational plan were not clear, such as the rationale for adopting the ACE curriculum at certain years only. The alignment of the ACE Curriculum to the New Zealand Curriculum was also unclear.</p> <p>The application did not provide sufficient achievement evidence to support the argument that the school would deliver improved outcomes for priority learners.</p> <p>No evidence of student achievement was presented.</p>
Ministry Assessment	<p>Section 1: Mission and Vision</p> <p><i>a) Rationale:</i></p> <p>The rationale for establishing this school is to further the sponsor's work with disadvantaged students, particularly Māori, in a safe environment supplemented by Christian values. The school is an existing private school, which is proposed to be closed and the students to be transferred to the new Partnership School. The application did not present a clear evidence-based rationale for establishing the school and relied heavily on anecdotal evidence to support the need for the school.</p> <p><i>b) Focus on Priority Students</i></p> <p>The application has a clear focus on meeting the needs of Māori students from low socio-economic backgrounds. There is a strong link made between providing a safe and supportive environment and educational outcomes. However, the application does not make a clear case that their proposed methods would improve outcomes for priority students. Student achievement data was not used effectively to demonstrate the applicant's success with priority learners.</p> <p><i>c) Sponsor's track record</i></p> <p>The private school has been in operation for approximately 17 years. The application claims a strong track record, but limited information is presented to support this. Further information about the school's track record over this period</p>

would have benefitted this section, including student achievement data.

Section 2: Educational Plan

a) Curriculum and Teaching

The proposed curriculum to be used includes the New Zealand Curriculum for Years 1-3 and 9-13, with the Accelerated Christian Education (ACE) curriculum used to deliver core subjects in Years 4-8. The rationale for the ACE curriculum given in the application is not clear and supporting evidence demonstrating the efficacy of the curriculum is not provided. The applicant provided further information and has indicated that they would be willing to review the use of ACE if required. Concerns were raised about the school's reliance on Te Kura to deliver the senior curriculum.

b) Support for priority learners

The school has a number of support mechanisms in place for students, including a comprehensive pastoral care regime ("We Care" philosophy) and a mentoring system (Tuakana – Teina system). Māori students are likely to be well-supported culturally and have access to te reo Māori tuition. However, the applicant did not provide answers to questions about supporting students with special educational needs, answering "N/A", despite highlighting in the mission and vision section that this was an area that was a key focus of the school.

c) Partnerships

The school has links to key community agencies through its existing operations, including Child, Youth and Family Services and local tertiary institutions. This is supplemented by organisations such as the Young Enterprise Trust and the Māori Women's Welfare League. The application also states that useful partnerships have been developed with parents and whānau.

Section 3: Business Plan

a) Governance

An organisational chart is provided in the application, which highlights subcommittees and other roles on the governance board. Limited information about accountabilities, roles and other responsibilities is provided in the application.

b) Finance

The financial response did not provide a completed balance sheet, although the proposed cash budget appeared logical and complete. Full assumptions for proposed costs were not included and would have benefitted this section.

The response underestimated the available funding that would be provided by approximately \$700,000 over the setup period and the first four years of operation. The sponsor does not propose to provide any additional funding to that provided by the Crown. The applicant placed a nominal sum of \$2,000,000 to be spent in year three without any supporting comment.

Approximately 75% of the teaching positions are proposed to be filled by registered teachers, with non-registered positions being filled by 'specialist tutors'. The student-teacher ratio is the highest of all proposed, ranging from 24:1 in 2015 to 34:1 in 2018 when the school is at capacity.

Overall, direct learning costs equate to just over 50% of the total budget, and an

almost even split of overheads and property costs at approximately 25% each.

c) Premises

The school is proposed to be located in Henderson, West Auckland, in the Futures West building (currently owned by the Ministry of Education). It is unclear from the information provided whether the Ministry is looking to sell or lease the building, or what discussions have taken place at this point. The sponsor plans to acquire and develop the vacant land on the site as the school expands, but it is not clear how this will be financed.

Section 4: Operational Plan

a) Enrolment

An open enrolment policy is proposed, which is compliant with section 158N of the Education Act 1989. However, the proposed enrolment policy does not include information about preference criteria, and whether the ballot process would be used if oversubscribed.

The school plans to achieve its enrolment target by transferring the body of students from the existing private school and through its community links. The existing school roll would provide the majority of the 2015 starting roll.

b) Other operations

The operational plan was a weakness of the application. Answers were often too high-level in their approach and it was not apparent how policies would be put into practice in the school. This section did not demonstrate the capacity and capability of the sponsor in running a successful school, although some sections were stronger than others, including information around staff recruitment.

Overall Comment:

Overall, this is a mixed application. Strengths of the application include the clear focus on highly vulnerable priority learners, and the support structures put in place to ensure the wellbeing of students. The Ministry does not doubt that the school provides a positive environment for Māori in West Auckland and supports cultural identity and wellbeing. However, concerns remain about the suitability of the ACE curriculum, the educational capability of the applicant and the viability of the proposed site.

Requests were made during the clarification period for student achievement records that the Applicant did not provide. s 9(2)(g)(i) OIA





s 9(2)(g)(i) OIA

6 Pacific Peoples' Advancement Trust (PPAT)

6.1 Overview

Applicant	The Pacific Peoples Advancement Trust
School name	Pasifika Community School
Vision/Mission	Enriched, vibrant, dynamic and successful Pasifika youth Secure and confident in their educational pathway, identities, languages and cultures
Target students	Students from low socio-economic backgrounds Pasifika students
Location	The Village, 26 Racecourse Parade, Avondale, West Auckland
Number of students (max)	250
Special character	Pasifika cultural context and approaches
Curriculum	Pasifika Community School curriculum aligned to the New Zealand Curriculum
Key Persons	La'auli Savae Michael Jones - Chairman Hamish Crooks - Trustee Emeline Afeaki-Mafile'o - Trustee Erima Henare – Academic Board Member Siautu Alalima - Academic Board Member
Year level	Y11-13+ Opening with Y11 initially; adding Y12 in 2 nd year of operation and Y13+ in the 3 rd year.

6.2 Summary of PPAT proposal

A primary function of PPAT has been to provide an umbrella Pasifika organisation whereby more localised projects driven by component organisations can more effectively deliver to the various target groups whilst providing a more centralised reference point for funders and key stakeholder groups alike.

It is proposed, for the purposes of a Partnership Kura that PPAT work through its two primary component organisations – The Village Community Services Trust ("The Village") and Affirming Works ("AW").

The respective chairmen of the component organisations - The Village (Michael Jones) and AW (Emeline Afeaki) - are currently trustees on PPAT.

PPAT was established by Pasifika community leaders from West, Central and South Auckland, initially to promote and provide for a Auckland and Pasifika response to raising aspirations and successful outcomes for Pasifika and also Māori youth through social and economic development programmes and projects, particularly around youth education and mentoring.

PPAT was used historically for the facilitation of the Pacific Leadership Group and Te Wananga o Aotearoa (TWOA) initiative.

In 2009 as a result of the Prime Ministerial Job Summit, the Tindall Foundation chose to partner with the Pacific Leadership Group (Hamish Crooks, Michael Jones and Pauline Winter – forming PPAT), to support a collaborative initiative with Te Wananga o Aotearoa (TWOA).

The initiative involved the delivery of NZQA accredited TWA training programmes through Pasifika organisations with greater community networks. The delivery began through PPAT's partner organisations the Pacific Business Trust, Pasifika Education Centre, and The Village Community Services Trust in August 2009.

PPAT has spent its first years building capacity amongst the network of community services and its partners. It seeks to not duplicate what other Pasifika community organisations are delivering but to provide specialised assistance towards advancing Pasifika education.

PPAT represents community-based organisations specialising in educating and empowering Pasifika people through the provision of education, training and mentoring Programmes. The PPAT consortium of community organisations has delivered qualifications at levels 1, 2, 3 and 4 to a student base comprising primarily at risk Pasifika and Māori youth and young adults, with the aim of getting more people fit for taking on work opportunities.

PPAT will establish the Pasifika Community School (PCS), Auckland. They will offer secondary education to its student population at Years 11, 12 and 13, equivalent to NCEA L1, 2 and 3.

PCS will be a school for Pasifika, by Pasifika and determined by Pasifika. It will also offer an open enrolment policy, welcoming students of other ethnicities who choose to study with PCS.

6.2.1 Priority Learner Groups:

Māori	50
Pasifika	200
Low socio economic	100%
Special Education	Variable

6.2.2 Educational Track Record of the Sponsor

PPAT represents community-based organisations specialising in educating and empowering Pasifika & Māori people through the provision of Training and Mentoring Programmes. For 12 years, these component organisations have served Pasifika youth and communities in Auckland. During this time, consultation with a wide range of individuals and organisations has enabled the component organisations within PPAT to tailor their range of services to ensure that Pasifika and Māori students are developing holistically as individuals and contributing positively to their families, their communities and society as a whole. Specifically they:

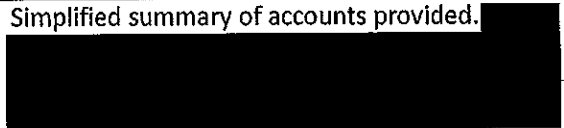
- Have delivered qualifications at levels 2, 3 and 4 to a student base comprising primarily at risk Pasifika and Māori youth and young adults, with the aim of getting more people fit for taking on work opportunities
- Provide strong links within the social services sector and a history of successfully implementing social service programmes for Pasifika communities.
- Provide a critical support structure and mentoring programmes for youth that contributes towards functionally productive Pasifika and Māori families -- since inception, they have delivered mentoring services at 39 primary, intermediate and secondary schools throughout the Auckland region to more than 7,500 Māori and Pasifika students.
- Have specialist personnel selected for their expertise in delivery of high quality social service and educational programmes, with background experience relevant to target group and organisational mission.

In all cases, this provision has been culturally centred and consciously focused on developing the individuals' personal growth and social values. The melding together of these approaches assists in creating or affirming the individual's self-esteem and social identity/responsibilities. By

knowing who we are, we are able to find our place within our family and therefore our community.

PPAT's component organisations (AW and The Village) have established themselves as leaders in the provision of educational and mentoring services in a culturally responsive way to Māori and Pacific (NCEA) students throughout the Auckland region.

6.3 Due Diligence: Review of Applicant Organisation

Section	Subsection	RAG	Comment
Organisational profile	Overall	Green	Registered Charitable Trust
	Year established		2009
	No of Staff		6
	No of Locations		1
Company Overview	Overall	Green	Established initially to promote and provide response to raising aspirations and outcomes for Pasifika and Māori youth. Used historically for the facilitation of the Pacific leadership group and the Te Wananga o Aotearoa initiative.
Commitments	Overall	Green	Working with Pasifika community organisations to enable them to deliver training and education programmes at levels 2, 3, 4 and 5 on the national qualifications framework. PPAT Tindall Foundation has also provided financial assistance to PPAT's organisations.
Probity	Overall	Green	Nothing of concern noted.
Nominated Partners	Overall	Green	The Village Community Services Trust (The Village) will provide; the recruitment of Pasifika learners from West and Central Auckland; mentoring services for students; a community advisor for engagement and support of students families. Affirming Works (AW) will provide; the recruitment of Pasifika learners from South and East Auckland; transport assistance for students; mentoring services for students; pedagogy assistance within course development; and a community advisor for engagement and support of students families. Open Polytechnic will; provide assistance with the development of the curriculum; tailor learning material; obtain and maintain.
Financial Summary	Overall	Red	Simplified summary of accounts provided. 
	Accounts provided	Red	Audited accounts provided forming a compliant response.
Quality Assurance	Overall	Amber	Referenced an initiative involved the delivery of NZQA accredited TWoA training programmes through Pasifika organisations with greater community networks. Various other references

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

			to NZQA Stds in role descriptions. No other evidence*
Health and Safety	Overall	Amber	They have covered off all the areas but have not identified an actual Policy*
	Written EHS Policy		As above*
	Formal EHS training		As above*
	Emergency Procedures plans		As above*
Referees	Overall	Green	MoJ, Youth Court, Judge Beecroft; MSD, Isabel Evans, Reg Commissioner of Work and Income; MoJ Youth Court, Judge Ida Malosi
	No of Referees provided		3

*Will form part of the contract negotiation if successful

6.4 Assessment of Application

Strengths	<p>The applicant has made a strong case based on a growing youthful Pasifika population in the area, providing detailed demographics including comparative analysis of NCEA achievement.</p> <p>A personalised education plan that focuses on at-risk Pasifika is proposed, supported with mentoring to determine educational pathways for each student.</p> <p>Qualifications are set out and good information around Unit Standards as well as pathways to achieving L1-3.</p>
Weaknesses	<p>While they have made a clear case for the needs of a Pasifika school, they have not demonstrated why the type of school they are proposing is the answer.</p> <p>The proposed curriculum was not adequately identified or justified as the best option for students. The approach to teaching and learning, while generally clear and supported by some evidence, provided limited information about actual subject material which would have benefitted the application.</p> <p>The application lacks evidence based rationale to support how the proposed approach will facilitate improved outcomes.</p> <p>They did not provide any response to the Priority Learner Group questions and limited information on the support for learning.</p> <p>Both the business plan and operations plan were lacking in detail and failed to demonstrate the level of capability expected to establish, implement and run a Partnership School.</p> <p>Limited response in the Business and Operations Plan categories</p>
Ministry Assessment	<p>Section 1: Mission and Vision</p> <p><i>a) Rationale:</i></p> <p>The rationale for a school to cater for Pasifika youth is clearly made and well-supported by evidential data. The application highlights a local need based on a growing population and comparative underachievement. However, it is less clear how the proposed school would be the solution to the highlighted problems.</p>

b) Focus on Priority Students

The application contains a clear focus on the needs of Pasifika youth in Auckland, and the sponsor group appears to have strong links to these communities through key Pasifika leaders. The school would be likely to appeal to many Pasifika families and students.

c) Sponsor's track record

The sponsor is active in the Pasifika community and responsible for delivering educational and community services. The sponsoring organisation would be likely to bring clear benefits to the school through its existing operations and links to the community. However, while its track record with the Pasifika community is strong, the application is less clear about the educational track record of the organisation. Further information about the sponsor's success in improving outcomes for priority learners would have benefitted this section.

Section 2: Educational Plan*a) Curriculum and Teaching*

The sponsor intends to offer the curriculum via a subcontracted arrangement with the Open Polytechnic. The educational offering is vocationally-focused but if there is strong support for academic study this would be offered as well. Comprehensive detail of the proposed curriculum and how it would be delivered was not included in the application, and there are concerns about the potential narrowness of proposed vocational pathways. The school also proposes to subcontract elements of the educational offering to the Open Polytechnic, but it is not clear how this would work in practice.

b) Support for priority learners

Although the applicant is clearly focused on the needs of Pasifika learners, the application does not fully present the sponsor's plan to meet these needs. It is unclear how the current educational offering would support improved outcomes for priority learners, and further information on this point is required. More information about how the school intends to support Pasifika achievement would have benefitted this section.

c) Partnerships

The sponsor has strong links to the local community through its existing operations, and possesses key individuals that can facilitate and grow relationships in the Pasifika community. These partnerships would be likely to add value to the learning experience. The school also proposes to subcontract elements of the educational offering to the Open Polytechnic, but it is not clear how this would work in practice.

Section 3: Business Plan*a) Governance*

An organisational chart showing school governance and accountabilities was provided in the application, as was information about the roles and responsibilities of different actors. More information about how governance and management would work in a practical sense would have benefitted the application, as would further information about the responsibilities of subcontracted partners.

b) Finance

The application provided a full financial response, with each section completed to a

high standard. All assumptions and working calculations were provided to support the proposed financial plan.

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

48% of all teaching positions are proposed to be filled by registered teachers in its first year of opening, decreasing to 35% when the school reaches its maximum roll. At maximum roll, the student-teacher ratio will average 21:1.

Overall, the proposed budget is considered acceptable once the school reaches the proposed maximum roll, with direct learning costs accounting for approximately 57% of total costs, and property and overhead costs at 19% and 24% respectively.

c) Premises

The preferred location of the school is the site of The Village Community Services Trust in Avondale, West Auckland. A lease is proposed, the terms of which will be negotiated. The Village currently holds a short-term lease

Section 4: Operational Plan

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

a) Enrolment

The proposed enrolment policy is unlikely to be compliant with section 158N of the Education Act 1989, which specifies enrolment in Partnership Schools. The applicant proposes that additional conditions be applied to enrolments, including the requirement that students "belong to and have the support of the community". The Ministry considers that this is likely driven by a commitment to enrolling priority learners, but should be clarified with the applicant. The application also states that the school will not cater for students with physical disabilities, which is not compliant with section 158O of the Education Act 1989.

The school plans to achieve their enrolments target by utilising its existing networks and operations, and provided demographic data to support a large priority learner population in the area.

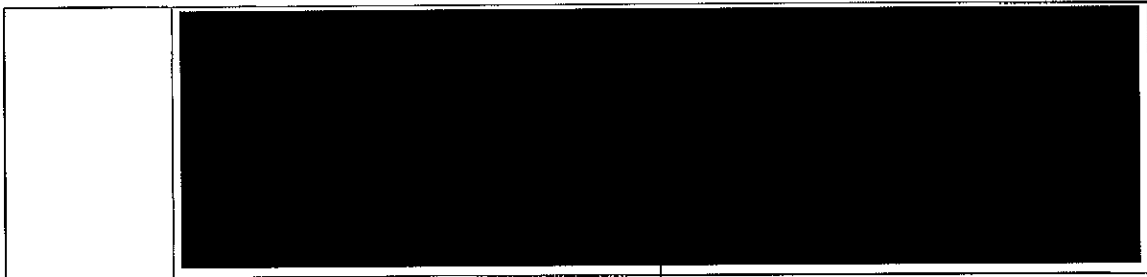
b) Other operations

The operational plan was a weakness of the application. Answers were often too high-level in their approach and it was not apparent how policies would be put into practice in the school. This section did not demonstrate the capacity and capability of the sponsor in running a successful school.

Overall Comment:

A proposal that meets the needs of Pasifika students has the potential to add significant value to education in Auckland. Strengths of the proposal include the track record of the sponsoring organisation and key personnel, as well as their ability to reach priority learners within the Pasifika community. Although there are some concerns around the educational offering, including the role of subcontracted partners, it was considered worthwhile to investigate the proposal further at interview, with questioning targeted at the educational capability of the applicant.

s 9(2)(g)(i) OIA



s 9(2)(g)(i) OIA

7 Te Kohao Health Limited

7.1 Overview

Applicant	Te Kohao Health Limited
School name	Nga Manukura
Vision/Mission	Kia whakarewa te ihi, te wehi te wana o te tamaiti ki, tea o. To provide a high quality bilingual kura in Hamilton city which inspires a thirst for learning through the power of te reo me ona tikanga and the natural environment. High expectations and quality teaching, plus inspirational, positive and fun experience, will ensure our tamariki reach their full leadership potential.
Target students	Students from low socio-economic backgrounds Māori students
Location	60 Tennyson Road, Hamilton
Number of students (max)	100
Special character	Kaupapa Māori
Curriculum	New Zealand Curriculum
Key Persons	Tureiti Moxon – Managing Director Nerina Hawkins , Awatea Parker, Denise Kingi, Nadine Hapuku, Stella Cowley, Kiri Moxon, Mariameno Kapa Kingi, Koroneihana Cooper QSM , Matiu Dickson, Owen Purcell, Te Rangi Martell, Tahi Tait
Year level	Y1-6 Opening with Y1-4 initially; adding Y5 in the 2 nd year of operation and Y6 in the 3 rd year.

7.2 Summary of Te Kohao Health proposal

Te Kōhao Health (the sponsor) is a charitable company and will have been operating for 20 years in November from Kirikiriroa Marae (KKM) servicing the wider Waikato region.

Te Kōhao Health was initially established as a medical centre and public health care provider providing low and no cost services to low income whānau of all ethnicities and walks of life.

It was always the vision of the kaumatua who established Te Kōhao Health that it would develop into a one stop shop of holistic integrated services from birth to death.

Te Kōhao Health now provides in excess of 25 different education, health, social and justice services to 8,000 clients/patients throughout the Waikato region. Currently they have 1028 tamariki who are aged between 4 -10 years old enrolled in their services.

Te Kōhao Health has held government funded contracts for just under 20 years and are well versed in managing multiple government and non- government agency contracts. They are highly experienced in the development and operation of a growing business and have highly skilled management staff to ensure that all performance targets and outcomes are met. They have a strong history of leadership and innovation as well as improvement through analysis, review and evaluation.

Te Kōhao Health is proposing a school year 1-6 and will run the school. The kura will be located in Enderley. Nearby are Fairfield Primary, Insoll Avenue School and the kura kaupapa – Te Kura-Kaupapa-Māori-o-Te-Ara-Rima:

Te Kōhao Health is proposing a school which is bilingual and has a strong Forest School focus. They will offer an alternative to those whānau who do not have the option of putting their tamariki into a kura kaupapa.

Ngā Manukura will be the first bilingual Forest School in the world. Being a part of the Te Kōhao platform means their teachers will be able to focus on teaching and not become de facto social workers.

Their kura will be bilingual, ensuring that Māori tamariki are immersed in both Te Reo Māori and English. Many other bilingual units are so small that they often have to limit intake. They will ensure that Māori tamariki immersion in Te Ao Māori provides a strong foundation for well-being and achievement.

7.2.1 Priority Learner Groups:

Māori	60
Pasifika	TBC
Low socio economic	60
Special Education	TBC

7.2.2 Educational Track Record of the Sponsor

Te Kōhao Health's main educational activities are the Attendance Services activity and the Early Childhood Education Centre. They now have another year of working in these areas and are confident in their ability and success.

They have the experience and track record of their proposed Tumuaki, Nerina Hawkins, whose personality and background are an ideal fit for their vision. Local Tumuaki, well known to them, have offered mentoring and support.

7.3 Due Diligence: Review of Applicant Organisation

Section	Subsection	RAG	Comment
Organisational profile	Overall	Green	Charitable Company
	Year established		1994
	No of Staff		145
	No of Locations		3
Company Overview	Overall	Green	Initially operating as a medical centre and public health care provider from Kirikiriroa Marae serving the wider Waikato region, Te Kohao Health now provide in excess of 25 education, health, justice and social services to over 8000 clients.
Commitments	Overall	Green	Multiple. Interest in education limited to incredible years and attendance service (as a subcontractor under National Urban Māori Authority (NUMA)) and Project Energize through Sport Waikato; have recently been approved Targeted Assistance for Participation (TAP) funding to build an early childhood centre.
Probity	Overall	Green	One possible staff personal grievance – they are unsure s to whether it will proceed.
Nominated Partners	Overall	Green	None – stated in the application that the Trust will implement the contract themselves.

Financial Summary	Overall	Green	No concerns of note identified
	Accounts provided		Yes forming a compliant response.
Quality Assurance	Overall	Amber	Referenced throughout the document and they do refer to accreditation though its difficult to see exactly what type of QA it is though it appears to be related to process. It isn't NZQA*
Health and Safety	Overall	Green	Policies included
	Written EHS Policy		As Above
	Formal EHS training		As Above
	Emergency Procedures plans		As Above
Referees	Overall	Green	National Urban Māori Authority, Toa Faneva; Peachgrove Intermediate, Louisa Barham; Te Kura Kaupapa Māori o Whahawatea, Suzanne Simmons Kopa
	No of Referees provided		3

*Will form part of the contract negotiation if successful

7.4 Analysis of Application

Strengths	<p>Application presents a clear and compelling rationale for the establishment of a new school in this area to meet an identified local need. The proposal is designed to meet a growing need for bilingual Māori education for those unable to access kohanga reo and kura.</p> <p>Sponsoring organisation is active in the community and the trust's capacity and capability is clear, although it is less clear the level of educational expertise available.</p> <p>The proposed school would add to an extensive array of wraparound services.</p> <p>Clear focus on the needs of priority learners (Māori from low socio-economic backgrounds). Demonstrates in-depth knowledge of the target student cohort and their needs.</p> <p>Trust has responded positively to feedback received after the last application round.</p>
Weaknesses	<p>The benefits of the Forest School method are not clearly set out and evidenced. It is not clear why this approach has been selected, and whether this will lead to improved outcomes for priority learners.</p> <p>The Trust has attempted to address concerns over lack of educational expertise available, and has recruited two teachers. More information about the backgrounds of these individuals would be useful.</p> <p>Plans for the use of unqualified teachers are unclear, and it is not explained what "easier to mould" means.</p>
Ministry Assessment	<p>Section 1: Mission and Vision</p> <p>a) <i>Rationale:</i></p>

The rationale for establishing this school is clear, meets an identified local need for provision and presents evidence to support this approach. The rationale is based on providing bilingual education for Māori students in Hamilton who are unlikely to have the language skills required to access kōhanga reo and kura kaupapa Māori provision.

b) Focus on Priority Students

The application focuses clearly on the needs of Māori students in Hamilton, many of whom are likely to come from low socio-economic whānau. Extensive demographic and student achievement data is presented to support this. The sponsoring organisation is a key community agency and provides a variety of wraparound services. The application shows a keen understanding of the needs of Māori students, and the proposed methods should support improved outcomes for students, although there was limited evidence provided to support the efficacy of the Forest Schooling method.

c) Sponsor's track record

The sponsor provides vital community services to families and whānau in Hamilton. The organisation has well-developed processes and good links to other agencies through its existing operations. The organisation has limited experience in delivering educational services, but has responded to concerns raised in the previous application round and enlisted the support of educational specialists to help build organisational capacity and capability. The trust has recently expanded its portfolio to include the provision of ECE services.

Section 2: Educational Plan

a) Curriculum and Teaching

The proposed curriculum is the New Zealand curriculum, supplemented with te reo Māori and the Forest Schooling method. The use of the curriculum is justified in relation to the school's mission and vision principles, but would have benefitted from evidence that supports the efficacy of the proposed approach. Curriculum and assessment details were provided in full and were well-evidenced.

b) Support for priority learners

The combination of wraparound services, bilingual education and the commitment to maintaining and upholding Māori identity are positive features of this application. Te reo, tikanga Māori and te ao Māori are prominent. The application demonstrates an understanding of the needs of Māori students and proposes effective solutions to overcome barriers to achievement.

c) Partnerships

The sponsor has strong links to the local community through its existing operations, and possesses a strong parent organisation that can facilitate and grow relationships in the Hamilton community. These partnerships would be likely to add value to the learning experience. A range of additional services would be available to support students, including health and wellbeing support.

Section 3: Business Plan

a) Governance

Organisational charts showing school governance and accountabilities were provided in the application, as was information about the roles and responsibilities of different positions. More information about how governance would work in a

practical sense would have benefitted the application.

b) Finance

A full financial response was included in the application, with each section completed to a generally high standard. However, more detail around the assumptions underpinning proposed costs would have benefitted this section.

The financial response accurately estimated the available government funding over each year of operation. The sponsor has proposed to invest an additional \$100,000 into the setup of the school and intends to generate modest revenues through fundraising. The applicant has noted that it would be seeking additional support from the crown to develop its proposed property arrangements over and above the funding envelope.

The applicant proposes to employ 62% registered teachers when at its maximum roll, when the student-teacher ratio will average 16.7:1.

Overall, the proposed budget is considered acceptable once the school reaches the proposed maximum roll, with direct learning costs accounting for approximately 57% of total costs, and property and overhead costs at 12% and 32% respectively.

c) Premises

The proposed location is in Enderley, Hamilton. The sponsor has purchased land adjacent to their ECE operation and a community centre and plans to build classrooms on this site. Initially, the school would operate out of the existing community centre, which would be leased. Early discussions with the leaseholder are said to be positive. The sponsor intends to seek philanthropic donations to meet building costs, which poses a risk to viability should those donations not be received.

Section 4: Operational Plan

a) Enrolment

A clear enrolment policy is not specified in the application. Further information on how the applicant intends to enrol students is required. The school plans to obtain enrolments through its existing operations, which could access 789 primary-aged students.

b) Other operations

The operational plan demonstrates the capacity and capability of the applicant in setting up and running new organisations. A large number of procedures and policies are already in place to support the school.

Overall Comment:

The application was amongst the strongest received in this round. Strengths included the clear and compelling rationale for the school, the quality of curriculum and teaching plans and the track record of the sponsoring organisation. However, the rationale for selecting the Forest Schooling method was not clear, and further information about the approach is required. While the sponsor has added to its educational capability, it is still not clear if this will be sufficient to carry the new school. Overall, the Ministry believes the application should be taken forward to interview in order to further interrogate the educational capability of the applicant.



8 Villa Education Trust

8.1 Overview

Applicant	Villa Education Trust
School name	West Auckland Middle School
Vision/Mission	Through effective teaching, quality facilities, an optimal day structure, and an integrated curriculum – allowing young people to develop and learn so as to give them the base for excellence in all spheres of life.
Target students	Students from low socio-economic backgrounds Māori students Pasifika students Students with special education needs
Location	West Auckland
Number of students (max)	240
Special character	Christian values
Curriculum	New Zealand Curriculum
Key Persons	Karen Poole – Business Manager Alwyn Poole – Academic Adviser Anna Ready Michael Sapolu Lindsay Faris
Year level	Y7-10 Opening with Y7-10 from start-up

8.2 Summary of Villa Proposal

The Villa Education Trust (VET) was established in 2002 in order to provide a governing body to the first school, Mt Hobson Middle School (MHMS). Ten years have been spent refining the model and creating the necessary systems needed for the efficient operating of a successful school.

In 2014 the South Auckland Middle School (SAMS) was successfully opened as one of the first Partnership Schools.

Villa has proposed West Auckland, catering for years 7-10 for their Partnership Kura, serving students from the West Auckland area. Using the 2013 School Directory information for the low decile schools in Waitakere. They calculated the average percentage of learners within each category and then used that to determine the number of learners in their Villas. The total is 240 to reflect their commitment to opening this partnership kura in a low decile community.

The figures used suggest there will be a higher proportion of Pasifika compared with Māori learners at West Auckland Middle School (WAMS). They also suggest there will be Pakeha learners and those from other ethnic groups. This will provide a rich cultural environment for all learners.

They would anticipate the proportion of learners with special education needs to mirror that of other schools in the community. In smaller schools it is important to maintain a balance to ensure that those learners with diagnosed special education needs are included in a “regular” school setting and that the school does not become a proxy for special schools. They have, therefore, suggested that approximately 8% of our learners are likely to have diagnosed special needs. This is based on information in an ERO report, which stated that half of the schools they reviewed reported that at least 7% of their students had special education needs.

8.2.1 Priority Learner Groups:

Māori	10%
Pasifika	80%
Low socio economic	70%
Special Education	10%

8.2.2 Educational Track Record of the Sponsor:

The Trust has successfully governed MHMS since its inception in 2003. In that time core processes and policies have been reviewed and refined as needed. The Academic Advisor (Alwyn Poole) and the Business Manager (Karen Poole) have proven expertise in leading and managing a successful educational institution. They have also proven their ability to extend the Villa approach and to open a new establishment. That SAMS was able to open on time, with a full staff and at a near capacity roll (88%) is testament to their abilities.

Further, much has been learned during the establishment of SAMS. This experience will be invaluable in establishing a larger campus in West Auckland.

8.3 Due Diligence: Review of Applicant Organisation

Section	Subsection	RAG	Comment
Organisational profile	Overall	Green	Registered Charitable trust
	Year established		2002
	No of Staff		21
	No of Locations		2
Company Overview	Overall	Green	The Trust was established as a governing body to the first school - Mt Hobson Middle School – which opened in 2003. The Trust opened South Auckland Middle School in 2014 as one of the first Partnership Schools.
Commitments	Overall	Green	Mt Hobson Middle School South Auckland Middle School
Probity	Overall	Green	Nothing of concern found
Nominated Partners	Overall	Green	No partners nominated
Financial Summary	Overall	Green	No issues identified
	Accounts provided		Accounts provided forming compliant response
Quality Assurance	Overall	Amber	Not referenced or evidenced*
Health and Safety	Overall	Amber	Policies referred to but not evidenced*
	Written EHS Policy		As Above*
	Formal EHS training		As Above*
	Emergency Procedures plans		As Above*
Referees	Overall	Green	Business Intelligence Consultant, Director; MacKenzie Elvin, Graeme Elvin; Cyperus Ltd, Dr Lorrae Ward

No of Referees provided	3
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*Will form part of the contract negotiation if successful

8.4 Assessment of Application

Strengths	<p>A case is made based on a variety of contributing 'innovations', which are acknowledged as being evident in other schools. The holistic environment is the key to this school.</p> <p>The School's flexibility and willingness to meet student needs; working collaboratively with parents in educational partnerships that are focussed on the success of students. Students are the centre of everything.</p> <p>Performance targets indicated encompass student achievement and soft indicators, as well as vision-specific and management targets. Measurement is generally well set out.</p> <p>Detailed explanation on school structure has been presented with three learning programmes - class-based (mornings); independent projects; extended practical activities.</p> <p>Described the Governance / Management model and fully delineated the roles and responsibilities for all levels of the school structure.</p> <p>Presented an unwavering conviction to school flexibility and willingness to meet student needs; and "that all learners can achieve their potential regardless of the barriers that exist"; work collaboratively with parents in educational partnerships that are focussed on the success of students.</p> <p>Provides performance targets encompassing student achievement and soft indicators, as well as vision-specific and management targets. Measurement is generally well set out.</p>
Weaknesses	<p>The Application has not presented an evidence-based rationale with a need for a school in the area. Supporting and promoting identity for Māori students is covered at a high-level, but does not demonstrate knowledge of the priority group. Not evidenced a plan for transitioning students to senior secondary schools.</p> <p>Inclusive environment for children with special needs, though less well-developed, and practices/structures/processes remain high-level (eg develop a holistic approach not explained).</p> <p>Governance / Management - model not justified/evidenced and limited information about how governance/management will be managed etc. Subcontracting underdeveloped.</p> <p>The applicant already runs two different schools in two different sites and there are capacity issues with opening new school in a third different location.</p> <p>The application lacked specific detail around policies and procedures with a number of areas while generally good appeared to be under developed.</p> <p>The proposed enrolment policy is not compliant with 158N.</p>
Ministry Assessment	<p>Section 1: Mission and Vision</p> <p>a) <i>Rationale:</i></p> <p>The rationale for establishing the school is based on providing an academic-focused</p>

middle school option for priority students in West Auckland. However, the applicant has not provided evidence to support the efficacy of the middle-school approach, or what benefits this would bring to priority learners. Basic demographic data was presented to support a growing population and some student achievement data was presented. Because a preferred location for the school was not provided, it was difficult to ascertain the need for a new school based on the local context.

b) Focus on Priority Students

The mission and vision focused on priority learners at a high level only, and did not go into detail about how the school would meet the needs of these students.

c) Sponsor's track record

The applicant has a track record in setting up and running new schools, which is effectively evidenced by their ability to successfully open a Partnership School in South Auckland in 2014. More information about student achievement at Mount Hobson Middle School would have benefitted this section, but the applicant generally communicated its educational credentials clearly.

Section 2: Educational Plan

a) Curriculum and teaching

The proposed curriculum is the New Zealand curriculum, supplemented by integrated project-based learning and a rotation through the arts, sports and community learning. The educational plan was generally thorough but could have benefitted from a stronger evidence base. Assessment strategies and student timetabling were covered in detail and effectively communicated the applicant's educational track record.

b) Support for priority learners

Plans to meet the needs of Māori, Pasifika and students with special educational needs were not covered in enough detail to demonstrate strong knowledge of the priority learner groups. However, plans to develop family/school partnerships were addressed in detail, suggesting the applicant would build positive relationships between the school and home. A variety of support services for families would be on offer.

c) Partnerships

As the applicant has not specified their preferred location in West Auckland, no partnerships have yet been established. The school intends to establish these relationships should they be approved, and highlights community organisations they may look to partner with in the future.

Section 3: Business Plan

a) Governance

The application included a detailed organisational chart and a narrative section highlighting the roles and key accountabilities of different layers of government and management. Concerns were raised about the trust's reliance on key persons (Alwyn and Karen Poole) and more information about how they will manage their commitments to three schools is required. There were also concerns about the viability of scaling up of the existing operations in 2015 due to the opening of the other new partnership school in 2014.

b) Finance

A full financial response was included in the application, with each section completed to a reasonable standard. However, more detail around the assumptions underpinning proposed costs would have benefitted this section.

The applicant overestimated the available setup funding, but underestimated operational funding over each year of operation covered by the proposal. The sponsor does not propose to invest directly into the school; however it proposes to attract approximately 5% additional revenue from fundraising activities.

All teachers will be registered. At maximum roll, the student-teacher ratio will average 24:1.

Overall, the proposed investment into direct learning equals 71% (one of the highest of all proposals received), with property and overhead costs at 4% and 25%, respectively.

c) Premises

The applicant has not identified a site for their school due to not having a preferred location in West Auckland. A realtor is in process of identifying potential sites. The applicant intends to employ the same process that delivered the South Auckland Middle School site in a short timeframe.

Section 4: Operational Plan

a) Enrolment

The proposed enrolment policy is not compliant with section 158N of the Education Act 1989, as Partnership Schools are unable to prioritise local students. Included in the policy is support for parents in filling out enrolment forms to ensure accessibility.

b) Other operations

The operational plan specified a number of policies that have been prepared, and the applicant has been able to base these on defined processes from their existing operations. However, this section lacked detail on how these policies would be implemented in practice, which affected the overall quality of this section.

Overall Comment:

The application was well-presented and generally thorough, which reflects the applicant's capacity and capability within education. However, a strong case for the need for the school was not made, and evidence was not always used effectively to support claims. The applicant has a proven educational track record and existing infrastructure. However, there remain concerns about the level of community support for a school of this type in West Auckland, as the application does not demonstrate strong links to the community or experience in this location. Additionally, the trust appears reliant on key individuals and adding an additional school to its portfolio could place strain on the organisation. Overall, the proposal is considered strong enough to be investigated further at interview.

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