



Briefing Note: Alternative schooling options and legislative options for partnership schools kura hourua

To:	Hon Chris Hipkins, Minister of Education		
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Summary

- This paper provides advice on the range of state schooling options available for sponsors of partnership schools | kura hourua (charter schools).
- If charter schools choose to, they could apply to continue to provide education within the state system. The decision of whether this can happen will be yours to make for each school. There are two state schooling options that you could consider:
 - Establishment of a designated character school; or
 - Establishment of an integrated school.
- Alternatively, sponsors may apply for registration as a private (independent) school.
- The Ministry has begun preliminary and without prejudice discussions with the sponsors of rounds 4 and 5 charter schools. To date four sponsors have indicated that they are interested in exploring alternative schooling options. However some of the sponsors have concerns about the governance and property arrangements in alternative schooling models and the potential loss of autonomy.



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7/12/17



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Purpose

1. To begin implementing the Government's policy of ceasing the partnership school kura hourua (charter school) model, the Ministry has begun preliminary and without prejudice discussions with the rounds 4 and 5 charter schools.
2. This paper:
 - a. Discusses the alternative schooling options available for you to approve, should the sponsors seek to continue providing education as a state school.
 - b. Summarises the outcomes of the discussions with sponsors to date.
 - c. Highlights the concerns raised in initial discussions by the sponsors and provides you with some potential options in response.

Alternative schooling options


3. Charter schools could seek to continue providing education within the state system. The decision of whether this can happen will be yours to make for each school. There are two schooling options you could consider. The closure of the schools as a charter school and the immediate opening of it as either:
 - a. A designated character school; or
 - b. An integrated school.
4. Alternatively sponsors may apply for registration as a private (independent) school. During the initial discussions with rounds 4 and 5 sponsors, four sponsors indicated that they are interested in exploring alternative schooling options¹.
5. Attached is a table which provides an overview of the differences between state, designated character, state integrated, private and charter schools (Annex one)². The differences between designated character school and charter schools are further discussed in paragraphs 22-23 below.
6. An integrated school must have a special character that is religious or philosophical and only a few of the charter schools would be likely to fit this definition. More significantly, the sponsor would probably become the Proprietor under integration, and would have to provide the land and buildings for the school.
7. To fund the provision of the land and buildings, a Proprietor charges attendance dues to parents of students. Sponsors are likely to be concerned about whether the families of their students could afford these dues.
8. A Proprietor also has less control of schooling operations than a sponsor of a charter school, because a Proprietor is the guardian of the special character, not the operator of the school. We therefore consider that it is unlikely that the sponsor of a charter school would consider investing in an integrated school.
9. It is also unlikely that sponsors of charter schools will consider opening as a private school because of the significant drop in funding. Private schools generally require significant fee income from parents, which would be unaffordable for many families with children currently at these schools.

¹ Note one of these sponsors operates an already open school in Auckland and is interested in alternatives for this school.

² This has been amended from the table provided to you in the Education Report 'Update on the removal of the partnership school kura hourua model' (METIS 1089096). This revised version separates out state and designated character schools.

10. We therefore think that the most likely option that will appeal to charter schools that are interested in continuing to provide education is for the school to apply to become a designated character school under section 156 of the Education Act 1989.

The designated character school model

11. A designated character school is a state school that has a particular character, which sets it apart from ordinary state schools and kura kaupapa Māori³. Te Pā o Rākaihautū is an example of a designated character school. Its designated character is a place-based curriculum for the 21st century founded on tikanga and Te Reo Māori, Te Ao Māori values, culture and history. Most Nga kura-a iwi affiliated kura are established as designated character schools.
12. In order for a new designated character school to be approved, three elements need to be present:
 - a. The designated character school provides education that in some specific way or ways is different from the character of ordinary state schools.
 - b. It is desirable for students (whose parents wish them to do so) to get such an education.
 - c. Students at the school will get education of a kind that differs significantly from the education they would receive at an ordinary state school.
13. The designated character of the school cannot be religious if the school is a primary school, because of the application of the secular clause in section 77 of the Education Act 1964. Three charter schools have a religious element to their mission statement – Rise-Up and the two Villa Schools (See Annex two). As these schools are primary (or in part primary) schools there may be issues for them if they apply to become designated character schools. They could, however, provide religious instruction in accordance with the religious instruction provisions in the Education Act 1964. Under current law, this would not be able to permeate through the school's curriculum.
14. s 9(2)(f)(iv) OIA 
15. Designated character schools have a maximum roll and the parents of students must accept the designated character of the school. The Crown owns or leases the land and buildings and funds the schools, as it does other state schools. As with other state schools, a designated character school must be justified as desirable within the network.
16. The Minister's consideration of the surrounding network of schools is an important part of a decision to establish a designated character school. Network considerations were not part of the decisions to establish the charter schools. As part of the establishment process for a designated character school the Ministry conducts an analysis of the surrounding network to estimate the impact that the additional school will have on the wider school network and consults with the boards of schools whose rolls might be affected.
17. Where applicable our follow-up letters after discussions with the rounds 4 and 5 sponsors have made these parameters clear, as well as the need for the designated character school to be of a size that is financially viable.

³ Kura kaupapa Māori are a form of designated character school. For one of the current Māori-immersion partnership schools to consider becoming a kura kaupapa Māori they would need to be prepared to amend their current mission statements to embrace the Te Aho Matua approach and philosophy.

Establishing a designated character school

18. In order to establish a designated character school, the Ministry works with the applicant and determines if the proposal is supported. If it is to be supported the Ministry seeks budget through a Cabinet process and undertakes consultation with boards of schools whose roll might be affected by the establishment of a new school. The Ministry then develops a report for the Minister detailing the application for establishment. The report provides robust information including the school's proposed designated character, roll projections, impact on the network, consultation undertaken, property development, financial implications, and any risks.
19. When considering an application, the Minister has absolute discretion to refuse to establish a designated character school.
20. Once the decision process has been completed and a school has been established, the Ministry seeks nominations for the Establishment Board of Trustees (EBOT) and the Minister chooses either to appoint the EBOT or have it elected by parents of prospective students. A Governance Facilitator is appointed to support the EBOT. Among other tasks, the EBOT is responsible for developing policies, appointing staff, keeping the community informed and taking enrolments. The Education Review Office undertake a Readiness Review before the school opens and becomes operational.
21. If you agree that a designated character school be established, it would be possible for the charter school to remain open during the application and establishment process (as the proposed designated character school is a separate entity). It would then be possible to close the charter school at an agreed time and for the designated character school to be opened at a time that reduces disruption to students and their learning.

Differences between designated character schools and charter schools

22. The designated character school model was not used to establish charter schools because its characteristics and requirements are different from the charter school needs described in the Confidence and Supply Agreement between the National Party and the Act Party. Designated character schools do not allow for a sponsor alone to control and govern the school, do not provide the freedom around the curriculum that charter schools have, and do not provide a cashed up funding model (intended to allow for innovation).
23. In summary, charter schools differ from designated character schools in the following ways:
 - a. Designated character schools must be governed by a Board of Trustees rather than sponsors.
 - b. Designated character schools receive operational grant funding and a staffing entitlement on the same basis as other similar state schools. Charter schools receive fully cashed up funding that is broadly consistent with the level of funding provided to an equivalent decile 3 school in the state system.
 - c. The Crown has the primary responsibility for providing property and land for designated character schools. Property funding for charter schools is provided using Cash for Buildings. It is suitable for sponsors to lease accommodation, but it is not sufficient for land purchase and capital works to build a new school.
 - d. Teachers at designated character schools must be registered teachers, whereas charter schools are able to employ non-registered teachers.
 - e. Designated character schools must use The New Zealand Curriculum (NZC) or Te Marautanga o Aotearoa (TMOA), with the flexibility to design their own school

curriculum that responds to the needs of the community. Charter schools can use the NZC or TMoA or they can develop their own curriculum framework which must be in line with any foundation curriculum policy statements of the NZC or TMoA.

- f. Designated character schools must be open for instruction for a minimum of four hours a day, and are required to be open for a certain number of half days each year, whereas charter schools can set their own length of the school day and year.

Discussions with round 4 and 5 charter schools

24. The rounds 4 and 5 charter schools are scheduled to open in 2018 and 2019 respectively. The Ministry has carried out initial discussions with each school sponsor and followed up with a letter or email. Annex 3 provides a summary table of the response of each sponsor at each initial meeting, the messages that the Ministry gave in its follow up communication, and what the next steps are. The key high level points are:

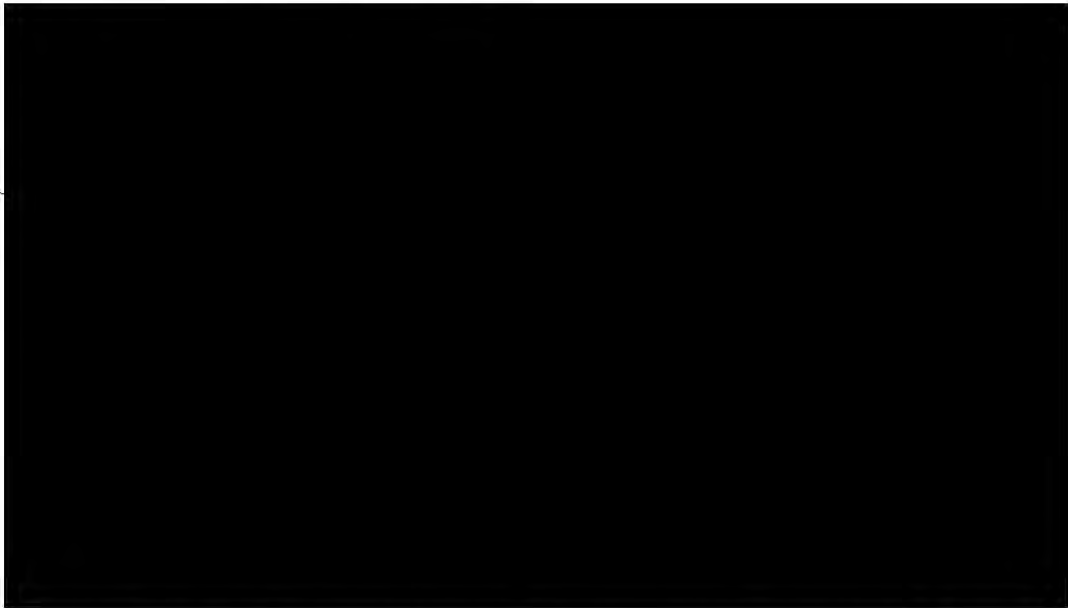
- a. Blue Light Ventures (round 4) has communicated that it has decided to not open in January 2018 and the Ministry is urgently progressing discussions including on planning for transition of enrolled students.
- b. Te Rangihakahaka Company Ltd (round 4) responded it was continuing to open in January 2018 so the Ministry will be providing usual operational support and meeting in February next year to progress the next round of discussions.

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s 9(2)(j) OIA

25. Discussions with Round 1-3 charter schools are scheduled to commence in February 2018. We will report back to you on the outcomes from those discussions.

Concerns raised and potential policy options

Concerns raised

26. During the preliminary discussions with the Ministry some sponsors raised concerns about governance and property funding under alternative schooling models. We anticipate that these concerns may be common to other sponsors, including sponsors of round 1-3 charter schools.
27. The discussion below about the concerns raised to date considers potential policy responses. The legislative options would need to apply to all charter schools, rather than being used to meet the concerns of any one individual school.

Governance

28. The sponsors ██████████
s 9(2)(j) OIA ██████████ raised similar concerns around the governance model of alternative schooling options, in particular concerns around their flexibility.
29. If the charter school closed and the sponsor looked at establishing a state school, an alternative constitution could be used to provide more flexibility around the governance structure. State schools can apply to have an alternative constitution if it is requested by 20% of the parents or by the EBOT. This could be the case once the EBOT has the school ready to move to an elected board (usually about 9-12 months after the school opens). The Minister must undertake appropriate consultation and may approve the alternative constitution for the board if he or she has reasonable cause to believe it is in the school's best interest.
30. This means that for designated character schools the board of trustees can reflect the different character of the school. Tai Wānanga is an example of a designated character school with an alternative constitution. The initial constitution⁴ for the board defined their board membership as three Minister of Education appointments, two Te Wānanga o Aotearoa appointments, two parent elected representatives, a maximum of two co-opted representatives and the principal.
31. This model provides flexibility around the governance structure. The use of an alternative constitution could allow for the appointment of the sponsor's representative(s) to the board of trustees. There are no restrictions on the sort or number of members that make up a board of trustees under an alternative constitution. However, a board of trustees made up solely of the sponsor and its representatives (without any parent representatives) would be unpopular and out of step with the model for boards within the wider state schooling sector.
32. The delay in establishing an alternative constitution for any new designated character school may be a concern for sponsors. Waiting until the support of 20% of the parents of the students enrolled at the school can be obtained would mean that the school would need to open for 6-9 months before an alternative constitution could be put in place. To mitigate this, you could progress a simple legislative provision to enable for an alternative constitution from the outset for any schools established to replace a charter school.

⁴ This was the initial constitution for the Board. After having it for a period the Board applied for it to be amended to more closely reflect the intent of the school's designated character.

Autonomy

s 9(2)(i) OIA

33. The sponsor [REDACTED] was interested in the designated character school model but raised a desire to retain its autonomy. As indicated above for Tai Wānanga a designated character school with an alternative constitution has considerable flexibility, and the proposed next step is to explore alternative schooling options with [REDACTED] including whether an alternative constitution such as used at Tai Wānanga could be applicable to their school.

s 9(2)(j) OIA

Property

s 9(2)(j) OIA

34. The sponsor [REDACTED] raised concerns about the property funding [REDACTED] and signalled that changes to property funding would be a significant change in business model. [REDACTED] currently lease their property (as do some other schools). We need to explore further with [REDACTED] their concerns around property.

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s 9(2)(j) OIA

35. Property funding for charter schools is suitable for sponsors to lease accommodation, but it is not sufficient for land purchase and capital work to build a new school. Some sponsors have made contributions in order to purchase land. Twelve schools are in leased premises or propose to be in leased premises and four schools own or propose to own their own land and buildings.
36. The Crown has the primary responsibility for providing property and land for state schools. If the sponsor of a charter school applied to establish a designated character school the Crown would need to provide capital funding to purchase or lease land and build facilities for these schools.
37. Purchasing existing properties or re-negotiating leases will need to be considered in negotiations with individual sponsors. [REDACTED]

s 9(2)(f)(iv) OIA

Other issues that may be raised

Registered teachers

38. Charter schools are currently able to employ some non-registered teachers. If you agree to establish a designated character school this would no longer be possible, as designated character schools must have registered teachers or limited authority to teach holders. Some of the schools report difficulty recruiting registered teachers to teach Te Reo Māori but this is an issue with teacher supply generally, rather than a factor specifically related to charter schools.
39. The numbers of registered teachers required under the contracts range from 60% to 100%. We will provide further advice on the impact on school staff in the context of the more detailed discussions with the schools.

Funding

40. The current charter school funding model provides a broadly consistent level of funding to an equivalent decile 3 state school. However sponsors receive bulk funding that maximises flexibility for the sponsor.
41. Funding flexibility was one mechanism intended to encourage innovation. Having this freedom over expenditure is a key part of the model and is one that means they can have CEOs and pay teachers and principals more. We understand that a number of the

schools have used their funding to hire more pastoral care staff and to do things such as to provide uniforms and transport beyond that which the state provides for.

42. If a state school was to seek more pastoral care staff or do things such as provide uniforms, its board of trustees would need to consider prioritising this in their operational grant.

Employment

43. A number of the charter schools have a CEO who is not the professional leader of the school. A potential issue that may be raised is the ability to employ a CEO if the sponsor closes the charter school and establishes a state school. It would be possible to employ a CEO as well as a principal but this position would need to be funded out of the operations grant. The school would need to work through the relationship and duties of the principal and CEO, because some of the roles and responsibilities of principals are set out in legislation and collective agreements.
44. Charter school teachers are employed by sponsors under separate terms and conditions to state schools. It is possible teachers made redundant by a charter school might face a drop in salary if subsequently employed by an establishing state school.

Legislation

45. The legislative options that we can consider that can apply to all charter schools (Rounds 1-5) are:
 - a. An amendment to exempt the charter schools with a religious character from application of the secular clause in section 77 of the Education Act 1964.
 - b. To mitigate the delay in establishing an alternative constitution (which could allow for the appointment of the sponsors or the sponsors' representatives to the board of trustees), a provision could be progressed to enable an alternative constitution from the outset (i.e one that doesn't require the school to be open for six to nine months before allowing an alternative constitution) for any schools established to replace a charter school.

Timeframe scenario for establishing designated character schools

46. It takes approximately nine to 12 months to establish a designated character school where no additional property funding is required.
47. In terms of timeframes it may differ for charter schools that are operating and those not set up yet. Below is a possible timeframe for establishing a designated character school, based on a scenario of an existing charter school sponsor deciding to apply to establish a designated character school in early 2018, with no unexpected complications.
 - a. In Term One 2018 we would support the sponsor to put together and submit their application to become a designated character school.
 - b. In Term Two 2018, once the Ministry has received the application from the sponsor, we would undertake consultation with the schools whose rolls may be affected and sector groups. This consultation will take approximately 8 weeks.
 - c. In Term Two, once the consultation has been completed, we would prepare a report for you to consider about the establishment of the new school.
 - d. Once the school is approved an Establishment Board of Trustees (EBOT) and a Governance Facilitator would be appointed in Term Three 2018. During Term

Three the EBOT will develop policies and advertise for and appoint a principal. ERO will also be engaged to undertake a readiness review.

- e. In Term Four 2018 the EBOT would need to advertise and appoint senior staff and begin to accept student enrolments. ERO would begin the readiness process and this would continue into term two and three of 2019 after the school opens.
- f. In this possible timeline, the charter school would close in January 2019 and the designated character school would also open and be immediately operational in January 2019.

48. Discussions on alternative schooling options are scheduled to commence in February 2018. Termination by Minister's convenience by the end of the 2018 school year requires a termination notice no later than May 2018.

s 9(2)(j) OIA

Risks

49. Charter schools have a focus on certain priority groups and many of them have high Māori rolls or a special character specifically related to Māori education. Because of this, there is a possibility of legal risk from a Treaty of Waitangi claim.

s 9(2)(j) OIA

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s 9(2)(j) OIA

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s 9(2)(f)(iv) OIA

52. The process for establishing a designated character school comes with significant timing challenges. If a sponsor applies to establish a designated character school in Term One 2018 it would be possible to open the designated character school in Term One 2019 if the application is straightforward. However, for more complicated applications (for example, where a school is not currently operating and does not have property or there is a delay in the consultation process with schools whose rolls might be affected), the time it takes to establish the designated character school will be longer, so it may not be possible to open the school until 2020. We will continue to work with sponsors through their individual situations and will provide advice to you on an ongoing basis as each negotiation progresses.

Annexes

Annex one: Overview of the differences between different types of schools

Annex two: The special character of each charter school

Annex three: Discussions with Round 4 and 5 charter schools about terminating the contract by mutual agreement.

Annex one: Overview of the differences between different types of schools

	State school	Designated character school	State-integrated	Private	Charter School
Relationship with Crown	Crown entity	Crown entity	Crown entity	Private entity that is registered with the Crown.	Fixed term contract(s) with approved sponsors (legal entities that are bodies corporate or limited partnerships)
Can be run for profit	x	x	x	✓	✓
Provision of free education to the public	✓	✓	✓	x	✓
ERO reviews	✓ ERO conduct readiness reviews before the school opens and at set intervals thereafter	✓ ERO conduct readiness reviews before the school opens and at set intervals thereafter	✓ ERO conduct readiness reviews before the school opens and at set intervals thereafter	✓ Reviewed against the registration standards at set intervals.	✓ ERO conducts readiness reviews before the school opens and at set intervals thereafter.
Financial audit	Auditor-General.	Auditor-General.	Auditor-General.	Required to report annually to Secretary for Education against their Government subsidy on audited transactions.	Provide audited annual financial statements to the Minister for the sponsor and the school for the prior financial year.
Tuition fees	x	x	x	✓	x
Curriculum	Must use <i>The New Zealand Curriculum</i> (NZC) or <i>Te Marautanga o Aotearoa</i> (TMOA), but have flexibility to design their own school curriculum that responds to the needs of their students and local community.	Must use <i>The New Zealand Curriculum</i> (NZC) or <i>Te Marautanga o Aotearoa</i> (TMOA), but have flexibility to design their own school curriculum that responds to the needs of their students and local community.	Must use NZC or TMOA, but have flexibility to design their own school curriculum that responds to the needs of their students and local special character.	Can choose own curriculum framework, but must make details about it and its delivery available to parents.	Can choose to use NZC or TMOA, or use or develop own curriculum framework that can be mapped to the principles of <i>The NZC</i> or <i>TMOA</i> .

	State school	Designated character school	State-integrated	Private	Charter School
Qualifications	Must offer access to NCEA, but can offer other internationally recognised qualifications as well.	Must offer access to NCEA, but can offer other internationally recognised qualifications as well.	Must offer access to NCEA, but can offer other internationally recognised qualifications as well.	Can choose the qualifications and assessment framework on offer.	Can offer NCEA or an equivalent that is recognised by industry and tertiary providers in New Zealand.
May have a religious character	partial	x	✓	✓	✓
May have a special character	x	Must have a particular character which sets it apart from ordinary state schools or kura kaupapa Māori	Must have a special character that is religious or philosophical	Can pick their own character	Application process gives preference to schools with a special character that aligns with the governments priorities
Hours of operation	Must be open for instruction for a minimum of four hours for a day. Required to be open for a certain number of half days each year, but can vary these with Ministerial approval. Can elect to use cohort entry	Must be open for instruction for a minimum of four hours for a day. Required to be open for a certain number of half days each year, but can vary these with Ministerial approval. Can elect to use cohort entry	Must be open for instruction for a minimum of four hours for a day. Required to be open for a certain number of half days each year, but can vary these with Ministerial approval. Can elect to use cohort entry	Set own length of school day and year.	Set own length of school day and year.
Ombudsmen and Official Information Acts apply	✓	✓	✓	x	x (official information released by the Ministry in regular proactive releases)
Crown collective bargaining	✓	✓	✓	x	x
Must have registered teachers	✓	✓	✓	✓	x
Open enrolment	✓	✓	✓	x	✓

	State school	Designated character school	State-integrated	Private	Charter School
Establishment	Minister of Education establishes with Cabinet approval. Decisions usually based on network management need – e.g. increasing school age population in an area.	Application (from a third party) is submitted to the Ministry. Ministry undertakes consultation with boards whose rolls might be affected. Ministry develop a report to the Minister for consideration about the establishment of the school. Consideration of the surrounding network of schools is an important consideration. The Minister has absolute discretion to refuse to establish a designated character school.	Proprietor of an existing or potential private school or a school to be established applies to negotiate integration. If Minister approves the application, an integration agreement between the proprietor and the Crown is negotiated, signed and executed.	The managers of a proposed or unregistered private school must apply to the Secretary for registration. If the school meets the registration criteria, it must be registered. These criteria relate to roll size, and having suitable premises, staffing, equipment, and curriculum. The applicant manager must also be a 'fit and proper' person. Tuition must be at a standard no lower than at state schools.	Potential sponsors submit applications through an all-of-Government procurement process. Applications are considered by an authorising body. The authorising body undertakes due diligence and provides advice and recommendations to the Minister. Minister makes the final decision to approve or decline proposals.
Government funding	Receive operational grant funding via the Ministry based on student numbers and year levels, decile, and location. Ministry sets staffing levels, and centrally-funds teacher salaries. Have access to centrally-provided services such as transport, professional development and special education services. Board controls school finances.	Receive operational grant funding via the Ministry based on student numbers and year levels, decile, and location. Ministry sets staffing levels, and centrally-funds teacher salaries. Have access to centrally-provided services such as transport, professional development and special education services. Board controls school finances.	Receive operational grant funding via the Ministry based on student numbers and year levels, decile, and location. Ministry sets staffing levels, and centrally-funds teacher salaries. Has access to centrally-provided services such as transport, professional development and special education services. Board controls school finances.	Once the school is fully registered it receives a per-student subsidy from a capped Government fund, with no adjustments made for decile or location. Responsible for own finances, including payment of salaries. School owner provides capital cost. Property is not funded.	Funding is broadly consistent to the amount of funding as an equivalent decile 3 State School would receive, fully cashed-up to maximise flexibility. Property is funded using Cash for Buildings. No capital funding.
Government funding cont.					

	State school	Designated character school	State-integrated	Private	Charter School
	<p>Government provides capital costs.</p> <p>Property is provided by the State. Cash for Buildings may be used in order to lease land and buildings. Maintenance is funded.</p>	<p>Government provides capital costs.</p> <p>Property is provided by the State. Cash for Buildings may be used in order to lease land and buildings. Maintenance is funded.</p>	<p>Property is provided by the proprietor. Maintenance is funded.</p>		

Annex two: The special character of each Charter School

Round 1- 5 schools – key features

Sponsor/School	Round	School type	Sponsor focus	Education focus	Sponsor support	Property
Advance Training Group / Vanguard Military School Auckland	1	Senior Secondary, years 11-13 Co-educational	Military ethos and training methodology. Sponsor is for-profit.	Focus on achieving attitudinal and behavioural and academic excellence, with a future pathway to either training or employment with a multi exit point strategy when have achieved level 2 NCEA (or facilitate a deliberate pathway beyond that).	s 9(2)(b)(ii) OIA	
Albany Auckland (part of a group - linked to Vanguard Chch Ltd below)		Current roll (October 2017) 139, maximum roll 192				
Vanguard Military School Christchurch Ltd / Vanguard Military School Christchurch	5	Senior Secondary School years 11-13, co-educational Opening roll of 120 rising to 210	Key components of the Auckland school to be replicated in Christchurch – Military ethos and training methodology. Sponsor is for-profit.	Focus on achieving attitudinal and behavioural and academic excellence, with a future pathway to either training or employment.		
Christchurch He Puna Marama Charitable Trust/ Te Kura Hourua O Whangarei Terenga Paraoa	1	Secondary years 7-13 Current roll 205, maximum roll 300. Has a deliberate pathway option from early childhood services through to senior school.	Te Ao Māori focus, bilingual education, focus on creating students who are both local and global. Sponsor entity has charitable status.	Much of the history of the school is associated with 'A' Company Māori Battalion.	Have a number of registered early childhood centres and a service academy.	
Whangarei						

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

Sponsor/School	Round	School type	Sponsor focus	Education focus	Sponsor support	Property
He Puna Marama Charitable Trust/ Te Kāpehu Whetū (Teina Whangarei	2	Contributing primary years 1-6, co-educational. Current roll (October 2017) 108, maximum roll 150. Has a deliberate pathway option from early childhood services through to senior school.	Full immersion Māori delivery using Te Marautanga Aotearoa. Sponsor entity has charitable status.	Same as above	Same as above	
Villa Education Trust/ South Auckland Middle School South Auckland	1	Restricted composite, years 7-10, co-educational Current roll (October 2017) 174, maximum roll 180.	Innovative learning environment through individualised education. Student personal character built through applied Christian values. Project based learning Sponsor entity has charitable status.	Sponsor also operates Mount Hobson Middle School (private school).	Operate on a 'villa' concept of 60 students to each villa.	
Villa Education Trust/ Middle School West Auckland West Auckland	2	Restricted composite years 7-10, co-educational. Current roll (October 2017) 190, maximum roll 240	Same as above	Same as above	Same as above	
Rise Up Trust/ The Rise UP Academy	1	Contributing primary years 1-6, co-educational.	Gazette notice sets out the sponsor	Longer school day, high teacher to	Key concept is 'hearts and mind' programme emphasising family	

Sponsor/School	Round	School type	Sponsor focus	Education focus	Sponsor support	Property
Mangere East, South Auckland		Current roll (October 2017) 107, maximum roll 200.	operates the school on a Christian ethos Sponsor entity has charitable status	student ratio (approx.. 1:15).	engagement in their programme.	
Manakau Urban Māori Authority (part of a group - linked to MUMA Ltd below) / Te Kura Māori o Waatea Manakau Auckland	2	Full Primary years 1-8, co-educational. Current roll (October 2017) 90, Maximum roll 200.	Focus on urban Māori, seen as a holistic range of supports provided by the Urban Māori Authority. Sponsor entity has charitable status.	Note succeeded in Round 5 application for a secondary school that could provide a continuum of service from early childhood through to end of secondary schooling (and beyond).	School forms part of a much broader strategy to improve life outcomes for urban Māori. Sponsor supporting the programme with investment whilst grows towards capacity.	
Te Whare Wananga O MUMA Limited/ Waatea High Manakau, Auckland	5	Year level years 9-13, co-educational Opening roll of 50, growing to 145	Bi-lingual 'by Māori for Māori' approach, priority learner secondary school – three way collaborative relationship between student, their Whanau and wharekura. With an existing Charter School and an ECE, the Round 5 school provided for the end to end education pathway. Sponsor entity has charitable status	(Note already runs a round 2 bi-lingual yr. 1-8 full primary school also in Manakau and an early childhood service).	School forms part of a much broader strategy to improve life outcomes for urban Māori.	

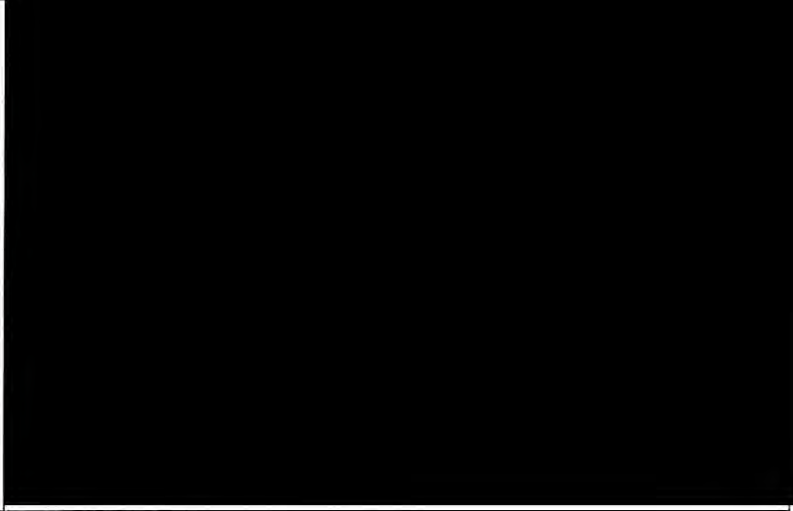
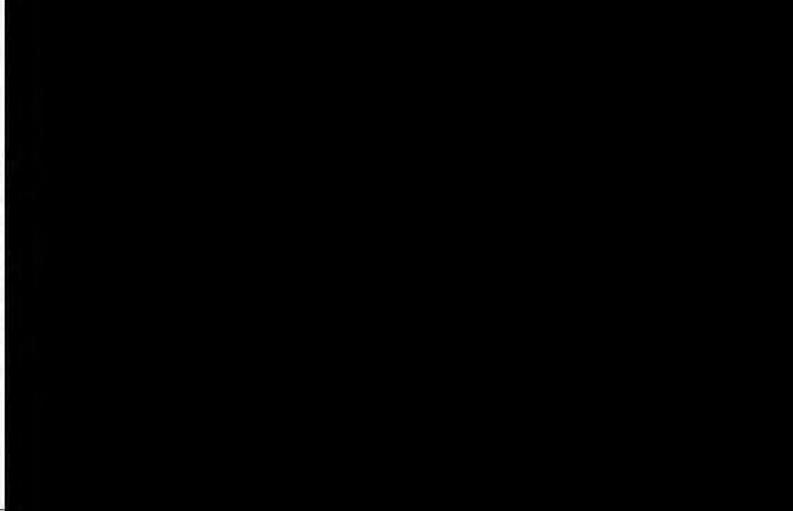
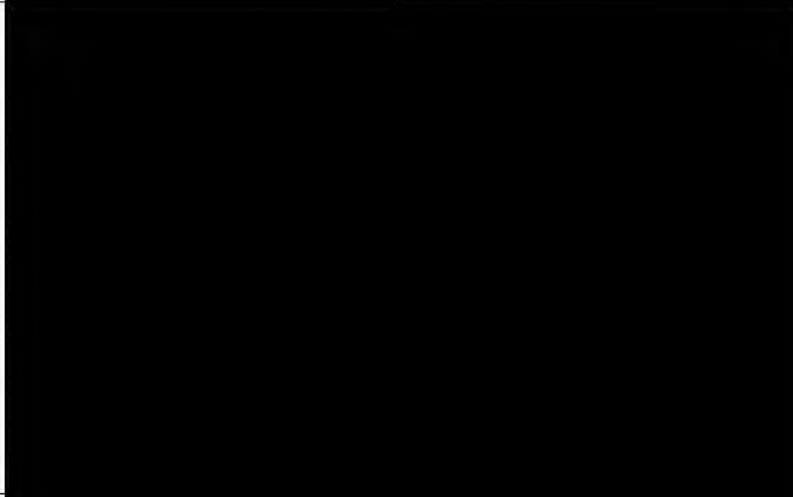
Sponsor/School	Round	School type	Sponsor focus	Education focus	Sponsor support	Property
The Pacific Peoples Advancement Trust/ Pacific Advance Senior School Otahuhu, South Auckland	2	Senior secondary years 11-13, co-educational. Current roll 69, maximum roll 250.	Pasifika focus Active religious instruction Sponsor entity has charitable status	Strong pastoral care focus – work with students who have been disengaged for a period of time.	Strong extra-curricular focus (eg. Music, community cultural activities and sport).	
Kia Ata Mai Educational Trust/ Te Kōpuku High Avalon, Hamilton	3	Senior secondary years 11-13, co-educational. Current roll 104, maximum roll 300.	Support for Māori students, technology and aspects of STEM to engage learners with project based learning. Sponsor entity has charitable status.	Sponsor has a strong education/PLD provision background – has been used by other schools and Ministry to assist with developments.	s 9(2)(b)(ii) OIA	
Trustees of the Te Aratika Charitable Trust/ Te Aratika Academy Whakatu, Hawkes Bay	3	Senior secondary school years 11-13 for males Current roll (October 2017) 33, maximum roll 200	Māori/Pasifika focus with emphasis on vocational and trade pathways . Sponsor entity has charitable status.	Sponsor runs a cadetship programme that has historically engaged Māori boys with life skills and into training and employment.		
Te Rangihakahaka Company Limited /Te Rangihakahaka Centre for Science and Technology Rotorua	4	Composite years 1-10, co-educational Opening roll of 80, growing to 200	“By Iwi for Iwi” philosophy Technology focus, using STEM as a curriculum focus. Interdisciplinary applied approach Sponsor entity has charitable status	Well progressed curriculum approach with 37 enrolments and over 150 expressions of interest reported	Crown funding supplemented by philanthropic and Iwi support	

Sponsor/School	Round	School type	Sponsor focus	Education focus	Sponsor support	Property
Blue Light Ventures/ Blue Light Senior Boys High School Wairakei Village	4	Senior secondary school years 11-13 for Males Opening roll of 30, growing to 90	Residential facility to be attached to the school with most students expected to be residential. Sponsor entity has charitable status.	Based on the philosophy of adventure based learning. 23 enrolments with another 60 potential enrolments.	Crown funding supplemented by philanthropic support and commercial use of the lodge when students are not there.	
City Senior School Limited/City Senior School Auckland	5	Senior Secondary school years 11-13, co-educational Opening roll of 100 growing to 300 students	Urban inner city school, located in Central Auckland, with a focus on Science, Technology, Engineering, Arts and Maths (STEAM). Sponsor entity has charitable status.	Three curriculum foci: STEAM Curriculum Green (sustainability) and workplace innovation projects and engagements with technology businesses in Central Auckland Whānau mentors.		
Te Runanga o Tūranganui ā Kiwa/ Tūranga Tangata Rite Gisborne	5	Junior secondary school years 9-11 co-educational Opening roll of 45 rising to 55 Although the school years are 9-11, the students could be older than students typically in the year levels, as school is targeting disaffected and potentially long-term truant students.	By Iwi for Iwi approach. Sponsor entity has charitable status.	Sponsor operates a number of education businesses including a PTE, alternative education contract, youth justice services, truancy services and holiday programmes.	Access to classroom, gymnasium and fully operational land based marine farm (to be used for out of the classroom activities).	

Annex three: Discussions with Round 4 and 5 charter schools about terminating the contract by mutual agreement

Round 4 and 5 PSKH Sponsor meetings

Round 5:

Sponsor	School	Response at initial meeting	Sponsor follow up (if any) and Ministry follow up	Proposed next steps
<p>Te Whare Wananga O MUMA Limited</p> <p>Also sponsor of round 2, Te Kura Māori o Waatea</p>	<p>Waatea High</p>			

s 9(2)(j) OIA

Sponsor	School	Response at initial meeting	Sponsor follow up (if any) and Ministry follow up	Proposed next steps
<p>Vanguard Military School Christchurch Ltd</p> <p>Associated with sponsor of round 1, Vanguard Military School, Auckland (VMS Auck)</p>	<p>Vanguard Military School Christchurch (VMS Chch)</p>			

Sponsor	School	Response at initial meeting	Sponsor follow up (if any) and Ministry follow up	Proposed next steps
City Senior School Limited	City Senior School			

Sponsor	School	Response at initial meeting	Sponsor follow up (if any) and Ministry follow up	Proposed next steps
Te Runanga o Tūranganui ā Kiwa	Tūranga Tangata Rite			

Round 4:

Sponsor	School	Response at initial meeting	Sponsor follow up (if any) and Ministry follow up	Proposed next steps
Blue Light Ventures	Blue Light Senior Boys High School	[Redacted]	[Redacted]	[Redacted]

Sponsor	School	Response at initial meeting	Sponsor follow up (if any) and Ministry follow up	Proposed next steps
Te Rangihakahaka Company Limited	Te Rangihakahaka Centre for Science and Technology	[Redacted]	[Redacted]	[Redacted]

s 9(2)(j) OIA

Sponsor	School	Response at initial meeting	Sponsor follow up (if any) and Ministry follow up	Proposed next steps
