Education Report: Guidelines and reporting requirements for Targeted Funding for Disadvantage

To: Hon Chris Hipkins, Minister of Education
Date: 22 February 2018
Priority: Medium
Security Level: In Confidence
METIS No: 1102343
Drafter: [Redacted]
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Round robin: No
Messaging seen by Communications team: No.

Purpose of report

This report seeks your agreement to introduce:

- Guidelines for how early childhood education (ECE) services and ngā kōhanga reo can use Targeted Funding for Disadvantage (Targeted Funding). The guidelines are provided in Annex 1.

- Reporting requirements for the ECE services and ngā kōhanga reo that receive Targeted Funding, which are provided in Annex 2.

Summary

1. On 30 November 2017, we provided you with a briefing on the implementation of Targeted Funding [METIS 1090095 refers]. You agreed for the Ministry of Education to consult the Early Childhood Advisory Committee (ECAC) on the draft guidelines and reporting requirements for Targeted Funding.

2. We provided the draft guidelines and reporting template to ECAC members from 11 to 25 January 2018. The feedback received was generally positive. We have incorporated a number of the suggestions made by ECAC members. We now seek your agreement to the finalised guidelines and reporting requirements, and for them to be released to ECE services and ngā kōhanga reo on 26 February 2018.
Recommended Actions

The Ministry of Education recommends you:

a. **Agree** to the annexed guidelines for how ECE services and ngā kōhanga reo can use Targeted Funding

   Agree / Disagree

b. **Agree** to the annexed reporting requirements for Targeted Funding to help the Ministry understand how Targeted Funding is spent

   Agree / Disagree

c. **Agree** for the guidelines and reporting requirements to be communicated to ECE services and ngā kōhanga reo on 26 February 2018

   Agree / Disagree

d. **Agree** that this Education Report is proactively released as part of the next publication

   Agree / Disagree

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Damian Edwards  
**Associate Deputy Secretary**  
Education System Policy  

2/2/18

Hon Chris Hipkins  
**Minister of Education**  

24/2/18
Guidelines and reporting requirements for Targeted Funding

Background

1. In Budget 2017, Cabinet agreed to provide $10 million per year for Targeted Funding. From March 2018, Targeted Funding will be provided to ECE services and ngā kōhanga reo with high proportions of children/tamariki from disadvantaged backgrounds.

2. As part of implementing Targeted Funding, we sought to ensure that extra funding was used in ways that benefit children/tamariki most in need. To achieve this, we identified factors that were limiting the impact of Equity Funding (the pre-existing targeted fund). These factors were:
   - minimal spending guidelines that offered ECE services and ngā kōhanga reo limited assistance on how to best use funding
   - a lack of restrictions on the use of funding has meant some services have used funding ineffectively
   - poor reporting requirements have resulted in the Ministry receiving little information on how Equity Funding is used.

3. To address these issues, we have developed the annexed guidelines for Targeted Funding and reporting requirements for Targeted Funding.

Focus of the guidelines

4. The guidelines aim to help ECE services and ngā kōhanga reo use funding in ways that best support children/tamariki most in need. They require ECE services and ngā kōhanga reo to spend Targeted Funding within four investment areas. Each investment area provides evidence-based examples that Targeted Funding can be used for.

5. The investment areas are relatively broad and provide ECE services and ngā kōhanga reo the flexibility to be innovative and respond to the changing needs in their communities. The investment areas are:
   - working with families/whānau
   - removing barriers to learning
   - enriching learning environments
   - supporting teachers, kaiako and parents.

Focus of reporting requirements

6. We have also developed reporting requirements for Targeted Funding. The reporting requirements focus on three aspects:

   - Planning and review processes: this focuses on understanding what processes ECE services and ngā kōhanga reo have in place to ensure Targeted Funding is used
effectively. Collecting this information will help us identify whether services require extra support. It will also incentivise better planning and self-review practices.

- **Use of Targeted Funding**: this will provide better information on how Targeted Funding is used. This will inform future policy decisions about what level of Targeted Funding is required. It will also help inform any future changes to the guidelines.

- **Impact of Targeted Funding**: this section requires ECE services and ngā kōhanga reo to review how they have used Targeted Funding and what impact it has had on the outcomes or children/tamariki.

**Consultation**

7. To help inform the development of the guidelines and reporting template, the Ministry provided draft guidelines to 23 ECE services with children/tamariki from disadvantaged backgrounds. These ECE services believed that the guidelines would help them make more informed decisions on how to use Targeted Funding. They did not identify any significant barriers to implementation.

8. Most of the ECE services consulted also supported introducing new reporting requirements. They believed these requirements would help ensure Targeted Funding was used effectively and to help children/tamariki most in need.

9. We provided the draft guidelines and reporting template to ECAC members from 11 to 25 January 2018. ECAC members provided generally positive feedback. They made four main suggestions for the guidelines:
   - to include a definition of children/tamariki from disadvantaged backgrounds
   - more background information on Targeted Funding
   - the removal of 'reward systems to encourage participation' from the guidelines
   - to include the specific example of teacher release time to engage with professionals, such as social workers, on issues relating to children/tamariki from disadvantaged backgrounds.

10. We have incorporated these suggestions, along with other minor changes.

11. The only substantive feedback on the reporting requirements was that it should be a requirement, rather than a suggestion, for ECE services and ngā kōhanga reo to keep a record of how they use Targeted Funding. We have incorporated this suggestion.

12. We have consulted the Te Kōhanga Reo National Trust (Trust) on both the guidelines and reporting requirements. The Trust provided a number of helpful suggestions on the guidelines, which focused on the use of Māori language. We have incorporated their feedback.
General feedback on Targeted Funding

13. Targeted Funding only uses one variable related to disadvantage to calculate funding: the time a child has spent as the dependent of a beneficiary. Two ECAC members expressed disappointment that Targeted Funding did not use a wider range of factors.¹

14. Given the multiple drivers of disadvantage and the work done on a multi-factor model in the Funding Review, they believed the use of multiple variables would improve our ability to target funding. This view is consistent with the results of modelling done as part of the Funding Review.

15. The former Minister of Education decided to use one variable in Targeted Funding for simplicity, and to be consistent with the Targeted At Risk Grant (TARG) in schooling.

16. In future funding rounds, you may wish to consider adding extra variables to Targeted Funding to improve its accuracy. We will provide you with advice on this as part of a wider discussion on the future direction of the Funding Review.

Communication to ECE services and ngā kōhanga reo

17. The first payment of Targeted Funding will be made to ECE services and ngā kōhanga reo on 1 March 2018.

18. With your approval, on 26 February 2018 we will publish the guidelines and reporting template in the He Pāui Kōhungahunga – the Early Learning Bulletin. Both documents will also be made available on the Ministry of Education’s website.

Proactive release

19. It is intended that this Education Report is proactively released as per your expectation that information be released as soon as possible. Any information which may need to be withheld will be done so in line with the provisions of the Official Information Act 1982.

¹ To inform the Targeted Funding calculation, the 20% of children attending ECE services and ngā kōhanga reo who have spent the largest portion of their life as the dependent of a beneficiary are considered to be from disadvantaged backgrounds.
Annexes

Annex 1: Guidelines for the Use of Targeted Funding for Disadvantage

Annex 2: Reporting Requirements for Targeted Funding for Disadvantage
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Introduction

Targeted Funding for Disadvantage aims to improve the affordability and quality of early learning for tamariki/children from disadvantaged backgrounds and ensure they start school ready to learn.

What are the Guidelines for?
The aim of these guidelines is to help you apply best practice when deciding how to use Targeted Funding for Disadvantage (Targeted Funding). All Targeted Funding must be used in a way that maximises benefits for our children/tamariki most in need.

What is included in the Guidelines?
Part One provides background information on Targeted Funding, such as when it is paid, how it is calculated and what the reporting requirements are.

Part Two outlines the planning and self-review processes you should have in place for Targeted Funding, and what Targeted Funding can be used for.

Part Three provides examples for how you can use Targeted Funding. These are evidence-based and drawn from best-practice examples across Aotearoa New Zealand.

Part Three is divided into four areas for spending.
Evidence shows that improvement in these areas can result in significant benefits to the early learning of children/tamariki.

You must spend Targeted Funding within these areas and in line with their objectives.

### Areas for spending and objectives

<table>
<thead>
<tr>
<th>Area</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Working with families and whānau</td>
<td>To extend relationships with families and whānau to support learning and development in the home.</td>
</tr>
<tr>
<td>2. Removing barriers to learning</td>
<td>To remove barriers to participation in early learning and meet the basic needs of children/tamariki so they are well positioned to develop and learn.</td>
</tr>
<tr>
<td>3. Enriching learning environments</td>
<td>Provide rich learning opportunities that support the development of children/tamariki, specifically their oral language and literacy development.</td>
</tr>
<tr>
<td>4. Supporting teachers, kaiako and parents</td>
<td>To support teachers, kaiako and parents to understand and respond to the learning and development needs of children/tamariki.</td>
</tr>
</tbody>
</table>

Suggested activities
For each area, we have provided examples of how you can use Targeted Funding.
The activities listed are suggestions only. We encourage you to develop innovative ways to spend Targeted Funding within each spending area.
Part One: An introduction to Targeted Funding for Disadvantage

Funding calculation
Targeted Funding is provided to early childhood education (ECE) services and ngā kōhanga reo with high proportions (20% or above) of children/tamariki from disadvantaged backgrounds.

The 20% of children/tamariki in early learning who have spent the largest portion of their life as the dependent of a beneficiary are considered to be from disadvantaged backgrounds. This definition applies for the purpose of the funding calculation only.

Your funding entitlement is based on an estimate of the number of Funded Child Hours (FCH) children/tamariki from disadvantaged backgrounds who will attend at your service or kōhanga reo in the coming year. Attendance data from the previous year is used to inform this estimate.

Key dates for Targeted Funding
Each year, the Ministry of Education will calculate the Targeted Funding entitlement of all eligible ECE services and ngā kōhanga reo. Any change in funding entitlement will be effective from 1 March.

Each year all ECE services and ngā kōhanga reo will be assessed for their eligibility to receive Targeted Funding. The Ministry of Education will notify eligible ECE services and ngā kōhanga reo of their funding entitlement in February each year. You do not need to apply to be included in this process.

Funding is paid in three instalments each year in line with the ECE operational funding cycle (March, July, and November).

Protecting privacy
To protect their privacy, we will not identify which children/tamariki are considered to be from disadvantaged backgrounds. Professional judgement and engagement with families, whānau and communities will inform decision making around how to best provide extra assistance and to whom.

Relationship to Equity Funding
Targeted Funding is separate to other funding streams. It is intended to complement Equity Funding Component A and its objective of reducing educational disparities in New Zealand.

Reporting requirements
Each year you must report to the Ministry of Education how you have used Targeted Funding. The reporting template is available on the Ministry of Education’s website and needs to be submitted by 1 February, the year after receiving Targeted Funding.1

Reporting must be completed at a license level. Umbrella organisations can collate the reporting templates of their members and supply them to the Ministry on their members’ behalf.

1 https://www.education.govt.nz/ministry-of-education/information-releases/targeted-funding-for-disadvantage/
Part Two: Planning and reporting processes for Targeted Funding for Disadvantage

Targeted Funding must be used for activities, staff or equipment that will benefit children/tamariki from disadvantaged backgrounds

What can Targeted Funding be used for?
Targeted Funding is for helping children/tamariki you believe are most in need of extra support. In deciding how to use this funding, think about what would make the greatest difference for these children. In practice, this may mean using the funding in ways that also benefit other children/tamariki, such as by providing transport or providing food.

Restrictions on the use of Targeted Funding
Targeted Funding is not for general operating expenses or profit. Annex 1 provides a list of expenses that Targeted Funding cannot be spent on. These are also detailed in chapter 13 of the ECE Funding Handbook.2

You should have a quality review process in place to plan for, and review, Targeted Funding
We have provided an outline of the recommended quality review cycle below, along with examples of how it might work. You can tailor this process to best meet your needs.

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Part Three: Areas for Spending

1. Working with Families and Whānau

Objective

To extend relationships with families and whānau to support learning and development in the home.

Te Whāriki: Wellbeing Mana Atua

Tamaki/children and their families and whānau experience an environment where connecting links with the family and the wider world are affirmed and extended.

Evidence

Research shows that a stimulating home learning environment has significant long-term benefits for children/tamariki. Teachers, kaiako and educators who effectively collaborate with families and whānau can increase the opportunities that children/tamariki have to learn at home.³

Research shows that when kōhanga reo whānau, kaiako and kaāwhina focus on iwi, hapū and whānau aspirations then they are most likely to achieve successful outcomes for their children.⁴

a) Increasing participation and access

» Engaging regularly with families and whānau to ask them what they would like to know about their children/tamariki learning and development, and ways to best support their early learning.

» For kōhanga reo and playcentre, funding can be used to continue to support the relationship between parents, families and whānau and their children/tamariki.

» Providing opportunities for teachers, kaiako and educators to build relationships with families and whānau through visiting children at home.

» speech language therapists

» child behaviour experts

» Kuia / Kaumātua

b) Incorporating different cultures, languages and identities

» Providing regular opportunities for children/tamariki to share their own culture with others, including New Zealand's own indigenous culture and language. This could involve providing resources and activities to recognise language weeks, cultural days, and events of cultural significance, (e.g. Poukai, Diwali, White Sunday).

» Purchasing learning material on the local area, local marae, whānau, hapū and iwi.

» Providing opportunities for children to visit places of significance for mana whenua such as the local marae. This can be organised in agreement with whānau, hapū and iwi.

c) Connecting families and whānau with community resources and programmes

» Empowering families and whānau through programmes that support their role as teachers and educators, and connecting parents, families and whānau with these.

» For kōhanga reo and playcentre, this may involve providing opportunities for parents, whānau and kaiako to attend development programmes to help support children/tamariki most in need.

» Developing a community hub for families, whānau, hapū and iwi – eg by providing a single location for community social services.

Retrieved from http://www.tandfonline.com/doi/abs/10.1080/1350293148209391

⁴ Education Review Office. (2017). Hauhinaketa Ngā Taonga Tuku Iho Kia Pūtawai Ai. Linearth our ancestral treasures so that we may prosper
d) Developing resources for families and whānau
   - Providing a library of books for families and whānau to borrow, including:
     - books and resources on parenting and child development
     - books and literacy resources in te reo Māori
     - a variety of fiction and nonfiction books to read with their children at home.
   - Purchasing a package of literacy and numeracy resources for families and whānau to use at
     home with their children/tamariki. This could include resources from the Early Reading Together
     Programme\(^6\) or the Raising Children Video Series.\(^6\)

2. Removing barriers to learning

Objective
To remove barriers to early learning and support the wellbeing of children/tamariki so they can develop,
learn and grow.

\textit{Te Whāriki: Wellbeing Mana Atua}
Tamariki experience an environment where their health is promoted.

Evidence
Research shows that attendance in high quality early learning leads to better outcomes later in life.\(^7\)
These benefits increase with the amount of time children/tamariki spend in quality early learning.\(^8\)

a) Increasing participation and access
   - Reducing fees for families and whānau where fees are a barrier to participation.
   - Assisting with transport to and from the service or kōhanga reo.
   - Promoting regular attendance. For example, using text message reminders.

b) Supporting wellbeing
   - Meeting basic needs, for example:
     - food for children/tamariki
     - clothing (shoes, gumboots, rain coats, jackets and sunhats)
     - toothbrushes and toothpaste
     - head lice kits.
   - Providing opportunities for health professionals to visit, for example:
     - a Plunket nurse to talk with parents, families and whānau about child development, before
     school checks and immunisations
     - iMOKO – a digital healthcare programme developed to increase access to health services for
     children\(^9\)
     - dental therapists to support enrolments in the free dental service
     - local doctors to talk with families and whānau about health and wellbeing in early childhood.

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\(^5\) Early Reading Together Programme. (Website). Retrieved from https://www.readingtogether.net.nz
\(^9\) https://www.google.co.nz/search?q=ro+imoko&oq=ro+imoko&amp;sourceid=chrome&ie=UTF-8
c) Providing experiences to enhance exploration
   » Funding transport for school visits.
   » Providing opportunities for families and whānau to support their children to go on excursions to the wider community where they can learn about te ao Māori.
   » Supporting the relationship between kōhanga reo and kura to continue to encourage seamless transitions for children/tamariki.
   » Providing opportunities for children/tamariki to learn about their community by funding trips to community spaces, such as the local museum or library.

3. Enriching learning environments

Objective
To provide rich learning opportunities that support the development of children/tamariki, specifically their oral language and literacy development.

**Te Whāriki: Contribution Mana Tangata**

Children/tamariki experience an environment where there are opportunities for learning irrespective of gender, ability, age, ethnicity and background.

Evidence
Positive early learning experiences set up strong foundations for later learning, behaviour and health. Supporting early literacy is important to later development. Evidence shows there is a positive relationship between engaging in early literacy activities in early childhood and reading performance at the age of ten.10

a) Providing experiences to enhance oral language and literacy development
   » Purchasing books and resources to support early language and literacy. Parents, families and whānau can read these with children/tamariki at home.
   » Providing resources and activities to reinforce the learning of waiata, pūrākau and kori tinana.
   » Providing books to support the early language and literacy of children/tamariki in their own language. For example:
      » Literacy Online11 offers books and resources for Pasifika children
      » providing books and resources in te reo Māori.

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b) Providing experiences to enhance social, emotional and physical development

- Providing resources that reflect and value the cultural background of children/tamariki.
- Creating links between the local community and the ECE service or kōhanga reo. For example, hosting visitors from the community (e.g., police, fire fighters, kuia and Kaumātua and the marae).
- Supporting language development within the local community and providing opportunities for families and whānau to learn te reo Māori alongside their children.
- Providing resources, equipment and programmes to support physical development. These could be sourced from organisations such as Sport New Zealand\(^\text{12}\), the Heart Foundation\(^\text{13}\) or Toi Tangata (Te Hotu Manawa Māori)\(^\text{14}\).

c) Enabling teachers, kaiko and parents to plan for individual tamariki and conduct self-review

- When teachers, kaiko and parents are planning for individual children/tamariki, funding could be used to pay for small projects based on their educational needs. For example, providing resources and equipment for:
  - planting and maintaining a vegetable garden
  - equipment for science experiments and activities
  - baking and cooking.


\(^{14}\) Toi Tangata (website) [http://toitangata.co.nz/](http://toitangata.co.nz/)
4. Supporting teachers, kaiako and parents

Objective

To understand and respond to children’s learning and development needs.

**Te Whāriki: Exploration Mana Aotūroa**

*Supporting children/tamariki to explore, learn from, respect and make sense of the world.*

Evidence

Research shows the quality of early learning depends on the skills, dispositions and understanding of teachers, kaiako and parents.\(^{15}\) Ongoing professional development can help teachers, kaiako and parents improve their ability to recognise the needs of children from disadvantaged backgrounds and work effectively in partnership with their families and whānau.\(^{16}\)

a) Identifying and responding to the specific development and learning needs of children/tamariki

» Funding one on one time with children/tamariki who require additional support.

» Providing professional development opportunities that enable teachers, kaiako and parents to respond to the needs of children from disadvantaged backgrounds. For example:

  › *The Incredible Years Teacher Programme*\(^{17}\). This provides teachers, kaiako and parents with new approaches to working with children who require additional support.

b) Enabling teachers, parents and kaiako to collaborate to meet the needs of children/tamariki who require extra support

» Supporting the relationship between kōhanga reo whānau and the kura, and continuing collaboration between kōhanga reo whānau, kaiako and the kura kaiako.

» Providing opportunities for teachers, kaiako, educators and parents to collaborate to reflect on ways to spend and improve their use of Targeted Funding. For example:

  › Seeking feedback from parents, families and whānau and the local community on how to best use Targeted Funding.

» Collaborating to plan for the development of children/tamariki. The funding could be used to arrange meetings that:

  › discuss how to best meet the educational needs of individual children/tamariki

  › plan and set development goals for individual children/tamariki

  › identify resources to assist with learning and development goals.

» working in clusters or Kāhui Ako with other ECE services, ngā kōhanga reo and schools on ways to improve the educational pathway for children/tamariki.

c) Planning for individual children/tamariki and conducting self-review

» Paying for professional development courses that focus on improving the planning and self-review processes outlined in Part 2 on these guidelines.

» Additional non-contact time for:

  › planning for individual children/tamariki and ways to spend Targeted Funding

  › reviewing the use of Targeted Funding and how it has benefited children

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\(^{16}\) ibid

\(^{17}\) The Incredible Years Programme. (Website). Retrieved from http://nb4.tki.org.nz/Incredible-Years-Teacher
Annex 1: Restrictions on spending Targeted Funding

Targeted Funding must be used for activities, staff or equipment that will benefit children/tamariki from disadvantaged backgrounds.

Below is a list of general expenses that Targeted Funding cannot be used for. We have provided examples of these expenses below. The examples are not exhaustive.

1. Property maintenance
   » painting
   » heating systems
   » roofing
   » general upkeep

2. Rental costs

3. Paying off debt

4. General educational resources
   » playground equipment
   » furniture (tables, chairs, bookshelves)

5. Investment in a separate account or entity and to accumulate interest or generate profit

6. Operating costs of the service or kōhanga reo
   » police vetting
   » teacher certification costs
   » electricity or water bills

7. Professional development for courses/seminars that are not aimed at improving the outcomes for priority learners.

8. Marketing and promotional activities or resources.
Annex 2: Planning for Targeted Funding

Below are examples of questions you could ask when you are planning how to use Targeted Funding.

1. What are your key objectives for improving the outcomes of children/tamariki from disadvantaged backgrounds?

2. What actions do you need to take to achieve your objectives and when do you need to achieve them by?

3. How will you know you have been successful? What information could you collect to help inform this?
Annex 3: Self Review Template

Below are examples of questions you could ask when you review your use of Targeted Funding.

1. What did you spend Targeted Funding on last year?

2. How did your use of Targeted Funding benefit children/tamariki from disadvantage backgrounds in your service or kōhanga reo?
   Measures for outcomes could include:
   » Feedback from parents, families and whānau and the local community.
   » Children’s learning stories.
   » Providing the planning for individual children’s learning and evaluation of that planning.

3. What did you learn? How could you improve your use of Targeted Funding next year?
Annex 4: Background information on Targeted Funding

Who is eligible for Targeted Funding?
Licensed early childhood education (ECE) services are eligible to receive Targeted Funding except:

- casual education and care services
- hospital-based services.

Certificated Playgroups are not eligible to receive Targeted Funding.

To protect the privacy of children identified as being from disadvantaged backgrounds, ECE services and ngā kōhanga reo with fewer than six children are not eligible.

Services and ngā kōhanga reo that have less than 20% Targeted Hours as a proportion of total funded child hours (FCH) are ineligible for Targeted Funding.

When will Targeted Funding be paid?
Targeted Funding will be paid with ECE operational funding in three instalments each year in the first payments of March, July and November funding rounds.

What period is Targeted Funding provided for?
In 2018, Targeted Funding is provided for the period 1 January 2018 to 28 February 2019. For all subsequent years, Targeted Funding is provided for the period 1 March to 28/29 February the following year.

Funding is paid on an hourly basis
Similar to how Equity Funding Component A is provided, eligible early learning services and kōhanga reo will receive additional funding for each Targeted Hour.

The funding rate per Targeted Hour was be determined in December 2017 and will remain fixed unless a decision is made to change it as part of the annual Budget process.

Will funding follow a forecast and wash-up cycle, similar to general ECE subsidies?
No. Funding entitlements will only be calculated once per year. Funding will not be recalculated or altered during the year based on actual attendance.

When will funding commence?
Targeted Funding for Disadvantage officially starts on 1 January 2018. Funding will then be paid in three instalments each year in line with the ECE operational funding cycle (March, July, and November).

The first payment will be made on 1 March 2018. As shown below, this payment will cover the six month period from 1 January to 30 June 2018. All subsequent payments will only cover a four month period.
Table 1: Payments dates and coverage

<table>
<thead>
<tr>
<th>Payment</th>
<th>Payment date</th>
<th>Period funding is provided for</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td>First year of funding</td>
</tr>
<tr>
<td>1st</td>
<td>March payment 2018</td>
<td>1 January - 30 June 2018</td>
</tr>
<tr>
<td>2nd</td>
<td>July payment 2018</td>
<td>1 July - 31 October 2018</td>
</tr>
<tr>
<td>3rd</td>
<td>November payment 2018</td>
<td>1 November 2018 – 28 Feb 2019</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Subsequent years</td>
</tr>
<tr>
<td>1st</td>
<td>March payment 2019</td>
<td>1 March 2019 – 30 June 2019</td>
</tr>
<tr>
<td>2nd</td>
<td>July payment 2019</td>
<td>1 July 2019 – 31 October 2019</td>
</tr>
<tr>
<td>3rd</td>
<td>November payment 2019</td>
<td>1 November 2019 – 29 Feb 2020</td>
</tr>
</tbody>
</table>

Payment of funding may be delayed if you have not submitted your RS7 Funding Return.

What data needs to be submitted to the Ministry of Education?
In December each year, the Ministry of Education will calculate funding entitlements for the coming funding period.
To be included in this calculation, you must have submitted your RS7 return for the months between June and September that year. This ensures the Ministry of Education can accurately estimate attendance in the coming year.
You should also ensure your ELI data is up-to-date in November each year as this data is used in the funding calculation.

Service closures or suspensions
To be entitled to the full amount of Targeted Funding, ECE services and ngā kōhanga reo must not close or be suspended during the period that Targeted Funding is provided for.
If an ECE service or kōhanga reo closes or is suspended after receiving Targeted Funding, they will not receive any additional payments.

Targeted Funding must be used in the year that it was allocated
Services must spend Targeted Funding in the year it is allocated and Targeted Funding is not to be used for expenses outside of the year that the funding is allocated.
We shape an education system that delivers equitable and excellent outcomes

He mea tārai e mātou te mātauranga kia rangatira ai, kia mana taurite ai ōna huanga
Reporting requirements for Targeted Funding for Disadvantage

Organisation number  
Organisation name  

Section 1: Planning and review processes

This section asks about what planning and review processes your early childhood education (ECE) service or kōhanga reo has in place for Targeted Funding for Disadvantage (Targeted Funding). Please ensure you protect children’s privacy by safely storing any documents that contain personal information.

1. Do you have written documentation for the following processes?  
   a. Assessing the needs and learning priorities of children from disadvantaged backgrounds  
   b. Planning how to use Targeted Funding  
   c. Reviewing your use of Targeted Funding

2. Did you consult staff, parents and whānau or the wider community on the following processes?  
   a. Assessing the needs and learning priorities of children from disadvantaged backgrounds  
   b. Planning how to use Targeted Funding  
   c. Reviewing your use of Targeted Funding

Section 2: Use of Targeted Funding

This section asks about what you spent Targeted Funding on last year. You must keep a record of how you use Targeted Funding.

3. How much Targeted Funding did you receive last year?  
   (this is provided on your Funding Notice)

4. Did you pool Targeted Funding with other ECE services and/or ngā kōhanga reo that received Targeted Funding?  
   If so, what percentage of your total Targeted Funding did you pool?

New Zealand Government
5. What percentage of your total Targeted Funding was used for the expenses listed below?

a. Subsidising fees %

b. Providing food and other basic necessities for children, such as nappies %

c. Transport for children %

d. Hiring additional staff %

e. Activities to engage families and whānau %

f. Professional development expenses, such as release time %

g. Educational resources tailored to meet the needs of children/tamariki from disadvantaged backgrounds %

h. Other (please specify below) %

6. Please detail why you chose to spend Targeted Funding on the first and second highest expenses (as noted above) and what evidence you considered when making this decision.

Section 3: The impact of Targeted Funding

7. Briefly describe how you consider Targeted Funding has benefited the children/tamariki from disadvantaged backgrounds in your ECE service or kōhanga reo and what evidence you have that this has occurred.

Parental surveys, observations of child behaviour and learning, and changes in attendance patterns are examples of evidence you could use to answer this question.