



Charter School Authorisation Board Te Poari Whakamana Kura Hourua

4.3

Board Paper

Title	Pakaraka SOHL Sponsor Approval
Meeting Date	11/08/26
Approver	Juliette Hayes, Head of Performance Monitoring
Author(s)	Beth Williams, Outreach and Applications Lead
Security level	IN-CONFIDENCE -RELEASE EXTERNAL

Purpose

1. To seek the Board's approval of the Society of Holistic Learners (SOHL) as a charter school sponsor under the Education and Training Act 2020 for Pakaraka School. The purpose of this paper is limited to consideration of the proposed sponsor entity and does not seek reconsideration of the Board's previous assessment of the school's conversion proposal.

Recommendations

2. It is recommended that the Board:
 - a) **Approve** the Society of Holistic Learners, registration number CC70000148 and NZBN 9429053646309, as the sponsor for Pakaraka School under section 212F of the Education and Training Act 2020.
 - b) **Note** that the Board has previously considered and approved the Pakaraka School conversion proposal.
 - c) **Note** that the application presented by the Society of Holistic Learners is materially unchanged from the application previously considered by the Board, with the principal change being the proposed sponsor entity.
 - d) **Note** the Converting School Report for Pakaraka School (Appendix One).

Background

3. Following the Board's previous consideration of Pakaraka School's conversion proposal, the proposed sponsor entity has changed from the 9(2)(ba)(ii)

[REDACTED] to SOHL has therefore submitted a new sponsor application for Board consideration.

4. The proposed school, educational model, curriculum approach, community support, operating arrangements, governance intent, and supporting information remain materially unchanged from the application previously considered by the Board. The only substantive change is the legal entity proposed to enter into sponsorship arrangements and assume responsibility for governance oversight of the charter school.
5. Accordingly, this paper does not seek the Board's reconsideration of the merits of Pakaraka School's conversion proposal, nor does it seek a reassessment of the school's educational model, viability, performance expectations, or community demand. Those matters have already been assessed through the Board's previous approval process.
6. The purpose of this paper is to enable the Board to assess SOHL as the proposed sponsor, including consideration of the entity's governance arrangements, organisational capability, fitness and propriety, and ability to meet the obligations of a charter school sponsor under the Education and Training Act 2020.

Discussion

Sponsor Assessment

7. The Agency assessed SOHL against the requirements for charter school sponsorship. This assessment included consideration of:
 - Governance capability and experience.
 - Organisational capacity.
 - Financial oversight arrangements.Community representation and engagement.
Sponsor governance structure.
 - Fit and proper person requirements.
8. The Agency's assessment is that SOHL demonstrates sufficient capability and competence to undertake the responsibilities of a charter school sponsor. The proposed trustees provide governance experience, strong community connections and support, and continuity with the vision and objectives previously presented to the Board.

Relationship to Previous Application

9. The Agency confirms that SOHL application is substantively the same as the application previously approved by the Board. The educational programme, student population, strategic objectives, curriculum design, and proposed operating model remain unchanged. Changes of note are that SOHL is not seeking designated character for Steiner education, understanding this is not possible under current legislation, and has not requested a delay to PAT testing until year 5 as previously requested.
10. The Agency therefore recommends that the Board focus its consideration on the suitability of SOHL as a sponsor rather than revisiting matters previously considered in relation to the school's conversion proposal.

Summary of views from the Chief Review Officer (ERO) and Secretary for Education (MoE).

11. The information provided by ERO and MoE presented a mixed view of the proposal by SOHL to convert Pakaraka School. They identified several promising features in the application, including stronger leadership, increasing enrolments, improved operational stability, and demand for a Steiner-inspired educational pathway. The groundwork completed around property and transition planning also provided a stronger foundation than existed in the previous application.
12. However, both the Ministry and ERO identified risks that require further testing. The most significant concerns relate to sponsor capability and governance effectiveness (as they are a largely unknown new board), educational performance history (which they note has plans to improve), community consultation (especially with Māori and non-Steiner families), the viability of expansion plans (as a very small composite school offering), and the impact on local families who may not support a Steiner educational model.
13. In short, their view was that the proposal presented a potentially valuable opportunity to expand educational choice, provided that it is educationally sound, financially sustainable, broadly supported by the community and capable of delivering improved outcomes for learners over the long term.

Agency Advice

14. The Agency is satisfied that:

SOHL has been established for the purpose of sponsoring Pakaraka School.

- Appropriate governance arrangements are in place to support sponsorship responsibilities.
- The proposed sponsor demonstrates sufficient organisational capability and community support.
- There is no material change to the school proposal previously approved by the Board.

15. On this basis, the Agency recommends approval of SOHL as sponsor for Pakaraka School.

Next Steps

16. If approved, the Agency will:

Notify SOHL of the Board's decision.

- Progress contract negotiations with the sponsor.
- Continue implementation planning for Pakaraka School's transition.

Provide updates to the Board as required.

If the proposal is not approved, the Agency will advise the applicant of the Board's decision and identify any matters requiring further consideration.

Appendices

Appendix One: Converting School Report – Pakaraka School



Converting School Report

Society of Holistic Learners Pakaraka School

This report contains the Agency's assessment of the Society of Holistic Learners (SOHL) as the proposed sponsor for Pakaraka School. It has been prepared to support the Authorisation Board's consideration if SOHL should be approved as a sponsor under section 212I of the Education and Training Act 2020.

Sponsor Details

- **Sponsor:** Society of Holistic Learners (SOHL)
- **Charities Registration Number:** 70000148
- **NZBN:** 9429053646309
- **School:** Pakaraka School
- **Application:** Approval of a sponsor under sections 212I and 212J of the Education and Training Act 2020
- **Board Meeting Date:** 11 August 2026

Contents

- 1. Report Summary.....3
- 2. Sponsor Application4
- 3. Governance.....28
- 4. Other papers from the application33
- 5. Statutory Declarations42
- 6. Ministry of Justice Checks55
- 7. CSA Assessment Panel Assurance Report61
- 8. Community consultation by proposed sponsor and Authorisation Board.....65
- 8. Education Review Office Views69
- 10. Ministry of Education Views74
- 11. Legislative authority for approval.....7

1. Report Summary

The Board has previously considered the proposal for Pakaraka School to convert to a charter school. The purpose of this report is therefore not to reassess the merits, viability, educational model, or community support for the school's conversion proposal. Rather, it is to enable the Board to assess the suitability of the Society of Holistic Learners as the proposed sponsor, including its governance arrangements, organisational capability, and compliance with the fit and proper person requirements set out in section 212J of the Act. It also summarises the community consultation undertaken on behalf of the Board.

This report recommends that the Authorisation Board approve the Society of Holistic Learners as the sponsor for Pakaraka School, subject to the Board being satisfied that the requirements of sections 212I and 212J of the Education and Training Act 2020 have been met.

2. Sponsor Application

The application is published on the charter school directory page

3. Governance

SOHL Trust Governance Model (Draft v1)

Threefold Social Order

This model establishes the Society of Holistic Learners (SOHL) Trust as the central legal and strategic "Head" (Thinking), a unified College of Teachers as the core "Heart" (Feeling/Culture), and two distinct Parent/Community Bodies as the operational "Hands" (Willing/Action). It aims to allow SOHL to scale into larger operations.

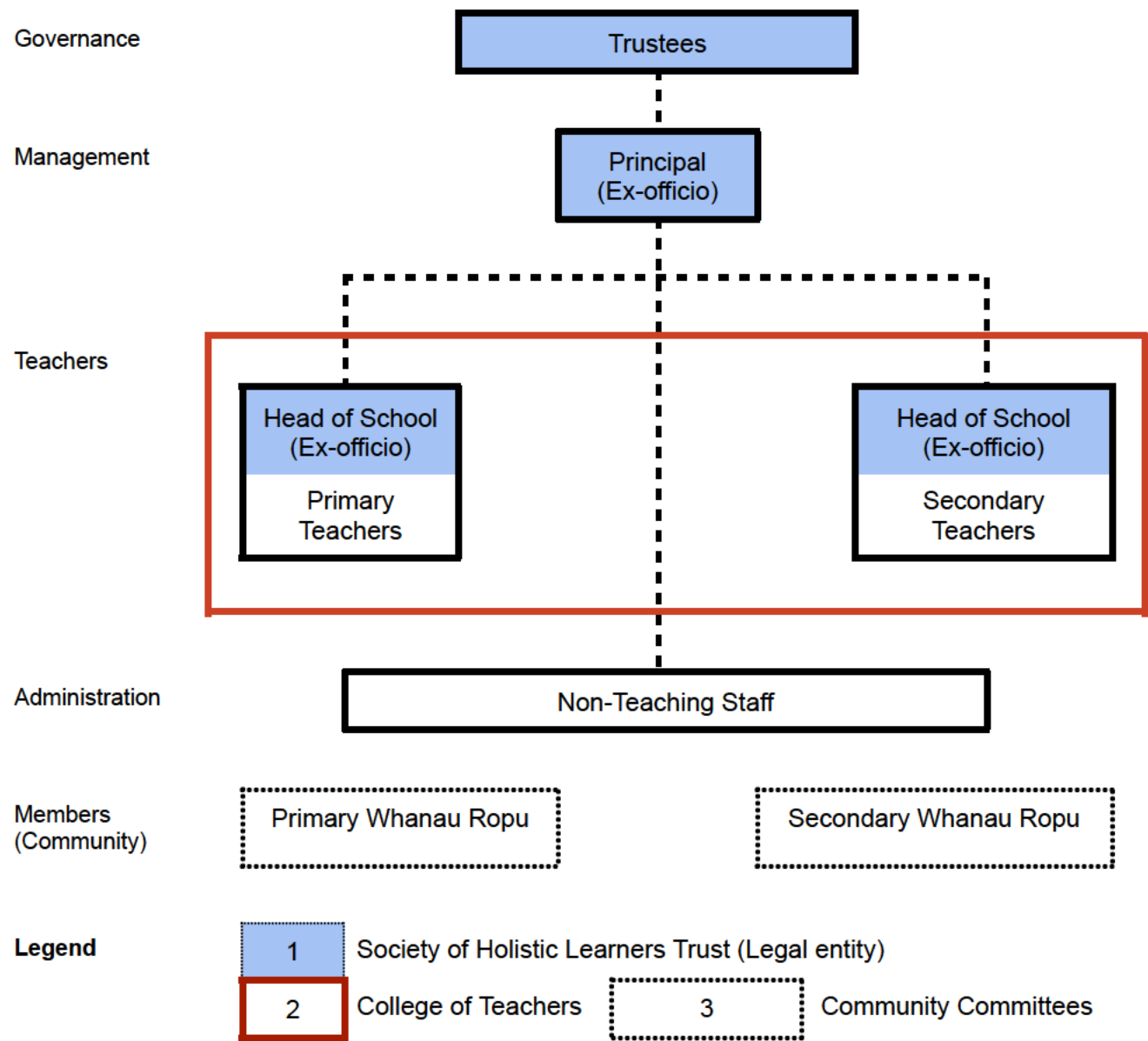


Figure 1: Shows the operational governance structure for SOHL Trust, where the blue boxes indicate the members of the SOHL Board.

1. The Head: Governing Board (Rights Sphere)

The SOHL Board acts as the Sponsor and is responsible for the overall legal and financial viability of both the Primary and Secondary Schools. Its focus is on strategic oversight, not daily operations.

Body	Role & Mandate	Membership
SOHL Board of Trustees	Strategic & Fiduciary Oversight. Holds the Trust Deed, ensures legal compliance, approves the budget, and appoints/manages the Principal, and handles disputes as appropriate.	7+ Members: • Community Trustees (~3), • Parent Representatives (1 per unit) (ex-officio, voting), • Principal (ex-officio voting) • College of Teachers Chair (ex-officio voting),
Key Function	The Principal acts as the Chief Executive for the entire Trust operations, ensuring economies of scale in administration and consistent execution of the Board's strategy.	1 FTE Role

2. The Heart: College of Teachers (Cultural Sphere)

This sphere holds the entire pedagogical mandate for the Waldorf/Steiner special character across all units, ensuring curriculum cohesion from 0–14 years.

Body	Role & Mandate	Membership
College of Teachers (CoT)	Pedagogical Autonomy & Cohesion. Responsible for all curriculum content, special character, staff development, and quality of education (the "why" and "how" of teaching).	All Certified Teachers from any School.
Unit Leadership	Curriculum Cohesion & Unit Management. Leads the CoT, provides educational leadership, and manages teacher performance.	Head of Curriculum/Pedagogical Leader (Leads overall CoT), Head of School (Primary Unit Lead), Head of School (Secondary Unit Lead)

Note on CoT Structure: This structure requires the Head of Curriculum to be focused on pedagogical leadership across the units, while the Head of Schools act as team leaders and unit administrators under the Principal/CEO who is ultimately responsible for human resource management for all staff.

3. The Hands: Community & Administration (Economic Sphere)

This sphere manages practical support, community engagement, and the non-teaching administrative needs of each unit.

Body	Unit	Role & Mandate	Membership (Annual Appointees)
Pakaraka School Primary School Whanau Ropu	Primary School	Action & Fundraising. Focuses on parent engagement, practical work (fairs, maintenance, gardening), and unit-specific fundraising. Contributes ideas for events to the School Head.	School Parent Appointees (Elected/Volunteers), School Head (Liaison), School Secretary (Administrator).
Pakaraka School Secondary School Whanau Ropu	Secondary School	Action & Fundraising. Focuses on parent engagement, practical work (fairs, maintenance, gardening), and unit-specific fundraising. Contributes ideas for events to the School Head.	School Parent Appointees (Elected/Volunteers), School Head (Liaison), School Secretary (Administrator).
Principal Office	Overall Trust	Operational Management. The Principal is the single line manager who provides resources, signs contracts, and ensures compliance across both units, supported by Unit Secretaries for co-ordination, and advised by the College of Teachers for Quality.	

How This Model Works

1. **Legal Delegation:** The SOHL Trust deed legally delegates Pedagogical Authority to the College of Teachers (CoT) and Executive Authority to the Principal.

2. **Size Management:** The Board remains small (3-5 trustees + ex-officio members) and focused on strategy. It is not managing two units, but instead managing one Principal with a direct connection to the College of Teachers.
3. **Cohesion:** The Principal (the line manager/executor) and the Head of College of Teachers (the pedagogical expert) both sit on the Board, providing a crucial bridge between the Head (governance), the Heart (culture), and the Hands (management).
4. **Operational Support:** The Parent Committees (Hands) are defined as service bodies, not governance bodies, which simplifies their structure and keeps the governance loop clear. Their input is advisory and practical, not binding on the CoT or the Board.

This structure provides the necessary clear lines of accountability required for a New Zealand Charter School application, while still upholding the Steiner principles of shared leadership in the three spheres.

4. Other papers from the application

Pakaraka Charter School - Student Assessment Strategy (Proposed v2)

Introduction

The assessment philosophy at Pakaraka Charter School is grounded in the Steiner understanding of human development and balanced by a commitment to culturally responsive practice as mandated by our bi-cultural commitment to our people and place.

Assessment is holistic, qualitative, and designed to support the development of the whole child (thinking, feeling, and willing), rather than focusing solely on quantifiable academic outcomes. Core components of the overall educational program include the student-teacher relationship; the artistic approach; working from experience to concept; working from whole to parts; use of rhythm and repetition. Throughout this, observation is the foundation for assessing the development of the whole child.

Observation is a skill cultivated in the teacher, and with time in the child also. The integration in the overall assessment process of academic testing, and later standardised academic testing, aids first the teacher and then both teacher and child in the development of the child towards adulthood.

Assessment of Philosophy and Principles

Principle	Description & Alignment	Bi-cultural Integration
Holistic Development	Assessment focuses on the student as a threefold being (body, soul, spirit) moving through developmental phases. Assessment tracks growth across physical, emotional, intellectual, social, and spiritual capacities.	This aligns with Te Ao Maori perspectives and models (for example, Te Whare Tapa Whā - the four cornerstones of Māori health/well-being) that aim to ensure assessment inherently respects a comprehensive view of the student. This is an active area of SEANZ development, and the school will develop its own unique integration alongside local kaumatua.
Observation as Primary Tool	The teacher's trained, detailed, and non-judgmental observation of the student's process of learning, character, and developmental readiness is the primary source of assessment data.	Teachers will integrate ako (the reciprocal nature of teaching and learning) and observation techniques derived from Te Ao Māori practice, ensuring observations are culturally relevant and contextualized.

Formative Assessments (Qualitative and ideally holistic)	Student progress is reported through rich, descriptive narratives that characterize the individual's development and relationship to the curriculum.	Reporting narratives will include language and concepts that affirm the student's cultural identity and progress in bi-cultural learning outcomes (e.g., mastery of Te Reo Māori or kapa haka performance skills).
Academic Assessments (Quantitative and often summative)	Standardized academic tests are only part of the overall assessment and are introduced in Class 4. They are a wider social expectation on the school as a whole and on the child beyond the school. We understand they will be used for reporting and monitoring the progress and achievement of individual students towards achievement targets. They are useful for identifying patterns and trends relating to student achievement, and play a crucial role in attainment of formal qualifications.	Academic assessments should recognise the cultural identity of students being assessed. For this reason we adopt assessments that are explicitly designed by New Zealand educators and for New Zealand students.
Developmental Readiness	Assessment evaluates whether the student is meeting the developmental expectations for their age phase, focusing on when they are ready for concepts, not just if they can retain information. Specifically: School Readiness assessments are conducted in the kindergarten child to confirm readiness for Class 1. This assessment is holistic covering a range of physical, cognitive and social capacities based on the expected child development stage.	This should be responsive and meet the needs of the learner. When appropriate this should include delivery in te reo Māori.

Overview of the class system, developmental stages, curriculum focus areas and assessment tools

Ten assessment tools are used formally across the curriculum, labelled I to X, and aligned with the developmental readiness of the child.

Age	School System	Steiner Developmental Focus	Assessment Tools
5–6	Kindy Year 1	<i>Willing: I am the world E ahau te ao</i> Focus on imitation, sensory integration, and imaginative self directed play. Simple imaginative stories and fairytales, poems with actions, singing including oriori and simple action songs, gardening, handcrafts, painting and drawing, learning to write their name, school readiness, social skills.	<u>Formative Assessment</u> Main Lesson Books: The student's hand-crafted textbooks serve as a primary portfolio showing depth of engagement and artistic application. Weekly Teacher Conferences: Time dedicated to "child study," where teachers collectively review and discuss students' progress and development.
6–7	Class 1 Year 2	<i>Feeling: I love the world E aroha ana ahau ki te ao</i> Introduction of literacy & the alphabet through picture and story utilising te Ao Māori, fairytales from around the world as well as Maori pūrakau, nature stories. Writing CVC words, and simple sentences. Understanding numbers, singing & beginning to learn pentatonic flutes, learning to knit, simple raranga/weaving.	<u>Summative Assessment</u> V. Year-End Narrative Reports: Comprehensive, qualitative written reports detailing the student's academic, social, artistic, and moral/spiritual progress for the year.
7–8	Class 2 Year 3	Māori mythology, legends, local geographic stories, stories of saints and heroes, animal fables, basic arithmetic, place value, times tables, geometry (for drawing), handwork (knitting and sewing). Cursive handwriting begins.	<u>Formative Assessment:</u> I. Main Lesson Books: The student's hand-crafted textbooks serve as a primary portfolio showing depth of engagement and artistic application. II. Weekly Teacher Conferences: Time dedicated to "child study," where teachers collectively review and discuss students' progress and development.
8–9	Class 3 Year 4	Practical skills, farming, house building, gardening, measurement. Creation stories (Ranginui and Papatuanuku, biblical, creation stories from around the world). Linear, liquid and weight measurement, place value, form drawing (geometry) Singing in the round, learning violin and recorder. Weaving, knitting.	III. Running Records (final in Class 4): A standardized diagnostic tool used to observe and analyze reading behaviors for early evidence of progress, particularly in literacy. <u>Summative Assessment:</u>

Age	School System	Steiner Developmental Focus	Assessment Tools
9–10	Class 4 Year 5	Local geography, stories of Maui, Norse myths and other trickster tales from around the world. Animal studies/ project learning, history of writing. Fractions Knitting in the round and cross stitch. Diatonic recorder, violin and/or other string instruments. Singing harmony/ parts. Reading musical notation.	IV. PAT (Progressive Achievement Test): Standardized, multiple-choice test to measure student progress in areas like mathematics, reading comprehension, writing, and grammar. V. Year-End Narrative Reports: Comprehensive, qualitative written reports detailing the student's academic, social, artistic, and moral/spiritual progress for the year. VI. Portfolio Review (Class 8 and 9): A review of accumulated work (art, practical crafts, main lesson books) to determine progression to the next class.
10–11	Class 5 Year 6	Ancient civilizations (Africa, India, Persia, Egypt, Greece), botany including study of native plants.	
11–12	Class 6 Year 7	History (Roman antiquity, Asia-Pacific antiquity), physics, geology, mineralogy, human anatomy, algebra, mosaics, wordwork.	
12–13	Class 7 Year 8	History (Renaissance, Pacific Navigators), chemistry, emergence of critical thought.	
13–14	Class 8 Year 9	Colonisation, revolutions, anatomy, meteorology.	
14–15	Class 9 Year 10	Thinking: I know the world E mohio ana ahau ki te ao Focus on world history, tragedy, physics.	
15–16	Class 10 Year 11	Geometry, advanced sciences, literature.	<u>Formative Assessment</u> VII. Project-Based Work: Extensive, self-directed research, practical projects, or artistic endeavors, often culminating in an oral presentation or exhibition (e.g., the Class 12 Project). VIII. Individual Feedback: Qualitative written feedback on drafts and work-in-progress to guide future learning. <u>Summative Assessment</u>
16–17	Class 11 Year 12	Independent research, art history, calculus.	
17–18	Class 12 Year 13	Class 12 Project, philosophy, final artistic studies.	

Age	School System	Steiner Developmental Focus	Assessment Tools
			IX. New Zealand Certificates of Steiner Education (NZCSE): Utilize this NZQA-approved framework which allows for tailored assessment modalities while providing a recognized qualification for tertiary entrance. X. Internal Crediting: Where necessary for compliance, we will use NZCSE or other formal assessment only in the required senior years.

Accountability and Compliance Strategy

Transparency of Method: We will clearly communicate our assessment methodology to the Charter School Agency, demonstrating how our qualitative, developmental data translates to and informs statutory achievement reporting.

Data Triangulation: Student progress will be monitored using a combination of: (1) teacher descriptive reporting; (2) performance-based assessment of cultural and practical skills; and (3) formal data points as required by the Charter School Agency.

Governance Oversight: The Board of Trustees will receive regular, aggregated reports on student progress, with data broken down to ensure equitable achievement for all student cohorts.

Accountability: Teachers should align the development of their assessments with support from Pakaraka School College of Teachers. Accountability for the quality of teachers' practice in each class sits with the Principal.

Pakaraka School PnL Summary 2026-2029 v2.0

This Pakaraka School (10 year PnL+) based on Charter School Funding Calculator.

Income

It is noted that adjustments will need to be made to the 2026 operations grant at the time of transition.

	2026	2027	2028	2029
School Roll	9(2)(ba)(ii), 9(2)(g)(i)			
Staff based funding				
Operations funding				
Service funding				
Property based funding				
Fundraising				
Total Income (minus any Establishment Funding)				

Expenditure

	2026	2027	2028	2029
Staffing (FTTE, incl. Principal)	9(2)(g)(i), 9(2)(ba)(ii)			
Staffing (incl ancillary staffing teacher aides and relief teaching)				
Kiwi saver				
Total staff funding				
Administration (excl wages)				
Site and buildings maintenance				

Teaching & Learning Resources	9(2)(ba)(ii), 9(2)(g)(i)
Total Operational Funding	
Total Expenditure	
Surplus/(Deficit)	

Capital items

The following is a list of proposed capital items based on the current 5YA projects being completed and projected roll growth buildings being realised. The items are subject to negotiations with the Ministry regarding incomplete 5YP projects and use of surplus funds.

	2026	2027	2028	2029
Included in PnL	9(2)(ba)(ii), 9(2)(g)(i)			
Property Maintenance				
F & E				
Capital Maintenance – OPEX				
Current 5YA projects				
Floor recarpeting (10 YPP)				
Playground replacement (10YPP)				
New building				
New building				
Land acquisition - TBC				
TOTAL				

NOTE:

- a. Assumes all current 5 YP are completed in 2026, and ministry funded.
- b. Enrolment growth is forecast to be conservative to minimise risk.
- b. Sensitivity analysis around larger enrolment numbers shows two ideal scenarios:
 - I. Faster enrolment growth (2026-2027), based on community support for secondary school and assuming CSA approval is given for a Year 1-13 campus. 9(2)(ba)(ii)

II. Stronger enrolment growth per year (2028-2035). This is a reasonable expectation based on the growth we are expecting next year (2026) already 9(2)(g)(i), 9(2)(ba)(ii)

c. 9(2)(j), 9(2)(g)(i), 9(2)(ba)(ii)

5. Statutory Declarations



Form A. Sponsor Statutory Declaration Form

To be completed by the person/role with authority to sign the declaration on behalf of the sponsor entity.

I **Rakesh Pinao**

of **9(2)(a)**

being the applicant for the Society of Holistic Learners (SOHL) trust

in my capacity as **Chairperson**

understand that the following information is required for the purpose of enabling a determination of whether the sponsor is suitable to operate a charter school | kura hourua. This information is required as outlined in the draft legislation to amend the Education and Training Act 2020 to enable the establishment of the charter schools | kura hourua model.

Where I have answered in the affirmative to any of the following points, I have attached all the relevant details in relation to the matter.

I solemnly and sincerely declare that all my answers to the following questions are true and correct.

Conviction History	Has the proposed sponsor ever been convicted of any offence involving fraud or any crime involving dishonesty?	NO	
Financial obligations to the Crown	Does the proposed sponsor currently owe, or have they previously owed money to the Crown including in respect of bodies the sponsor has been involved in managing?	NO	
Interventions in Other Charter Schools	Has an intervention ever been applied in relation to another charter school which is or was operated by the proposed sponsor?	NO	
Breaches of Statutory Duties	Has the proposed sponsor committed a serious or repeated breach of their statutory duties in relation to a charter school?	NO	
Other Relevant Matters	Are there any other factors or concerns that should be considered in assessing the proposed sponsor's fitness and propriety?	NO	

DECLARATION



I make this solemn declaration conscientiously believing the same to be true and by virtue of the Oaths and Declarations Act 1957.

**Sponsor
Signature:**



Declared at:

Kerikeri

**Official Witness
Name**

Raymond Ivan Pitch JP - 20177

Justice of the Peace
for New Zealand

**Official Witness
Signature**



Date:

19 - June - 2020



Charter School Agency

Form B. Governing Members Statutory Declaration Form

To be completed by all persons who are governing members of the proposed sponsor.

I Fiona Christine Murray

of [REDACTED]

being a governing member for Pakoraka School

in my capacity as Board Member

understand that the following information is required for the determination of whether the governing member is suitable to be involved in the management and operation of the proposed charter school | kura hourua. This information is required as outlined in the draft legislation to amend the Education and Training Act 2020 to enable the establishment of the charter schools | kura hourua model.

Where I have answered in the affirmative to any of the following points, I have attached all the relevant details in relation to the matter.

I solemnly and sincerely declare that all my answers to the following questions are true and correct.

Serious Criminal Activity

Has the governing member been convicted of serious criminal activity which is defined in section 10(1) as "serious criminal activity means any offence involving fraud, violence, or harm to children, any sexual offence, or any crime involving dishonesty".

NO

Bankruptcy and Director/Promoter Prohibitions

Has the governing member been

- adjudicated bankrupt under the Insolvency Act 2006?
- prohibited from being a director or promoter of, or being concerned or taking part in the management of,
 - o a company under the Companies Act 1993 or
 - o any other body corporate?

NO

Interventions in Other Charter Schools

Has an intervention been applied in relation to another charter school of which the person is or was a governing member of the sponsor?

NO

Breaches of Statutory Duties

Has the person committed a serious or repeated breach of their statutory duties as a governing member of the sponsor?

NO



Charter School Agency

Form B. Governing Members Statutory Declaration Form

To be completed by all persons who are governing members of the proposed sponsor.

**Other Relevant
Matters**

Are there any other factors or
concerns that should be considered in
assessing the governing member's
fitness and propriety?

NO

DECLARATION

I make this solemn declaration conscientiously believing the same to be true and by virtue of the Oaths and
Declarations Act 1957.

Governing member
Signature:

Murray

Declared at:

Pakaraka

Official Witness
Name

Irene Dorothy Armstrong

Official Witness
Signature

I. D. Armstrong JP.

Date:

9/12/2025

Irene D. Armstrong
NZ Justice of the Peace
No. 7014



Charter School Agency

Form B. Governing Members Statutory Declaration Form

To be completed by all persons who are governing members of the proposed sponsor.

I Christiane, Claudia, Brigitte Riegger
9(2)(a)
O

being a governing member for Pakaraka School
in my capacity as Board Member

understand that the following information is required for the determination of whether the governing member is suitable to be involved in the management and operation of the proposed charter school | kura hourua. This information is required as outlined in the draft legislation to amend the Education and Training Act 2020 to enable the establishment of the charter schools | kura hourua model.

Where I have answered in the affirmative to any of the following points, I have attached all the relevant details in relation to the matter.

I solemnly and sincerely declare that all my answers to the following questions are true and correct.

Serious Criminal Activity

Has the governing member been convicted of serious criminal activity which is defined in section 10(1) as "serious criminal activity means any offence involving fraud, violence, or harm to children, any sexual offence, or any crime involving dishonesty".

No

Bankruptcy and Director/Promoter Prohibitions

Has the governing member been

- adjudicated bankrupt under the Insolvency Act 2006?
- prohibited from being a director or promoter of, or being concerned or taking part in the management of,
 - o a company under the Companies Act 1993 or
 - o any other body corporate?

No

Interventions in Other Charter Schools

Has an intervention been applied in relation to another charter school of which the person is or was a governing member of the sponsor?

No

Breaches of Statutory Duties

Has the person committed a serious or repeated breach of their statutory duties as a governing member of the sponsor?

No



Charter School Agency

Form B. Governing Members Statutory Declaration Form

To be completed by all persons who are governing members of the proposed sponsor.

**Other Relevant
Matters**

Are there any other factors or
concerns that should be considered in
assessing the governing member's
fitness and propriety?

No

DECLARATION

I make this solemn declaration conscientiously believing the same to be true and by virtue of the Oaths and
Declarations Act 1957.

Governing member
Signature:

Declared at:

Official Witness
Name

Official Witness
Signature

Date:

Irene Dorothy Armstrong

P. D. Armstrong JP

9/12/2025

Irene D. Armstrong
NZ Justice of the Peace
No. 7014



Charter School Agency

Form B. Governing Members Statutory Declaration Form

To be completed by all persons who are governing members of the proposed sponsor.

I Marcus Harman Powell
of 9(2)(a)

being a governing member for Pakaraka School

in my capacity as Board Member

understand that the following information is required for the determination of whether the governing member is suitable to be involved in the management and operation of the proposed charter school | kura hourua. This information is required as outlined in the draft legislation to amend the Education and Training Act 2020 to enable the establishment of the charter schools | kura hourua model.

Where I have answered in the affirmative to any of the following points, I have attached all the relevant details in relation to the matter.

I solemnly and sincerely declare that all my answers to the following questions are true and correct.

Serious Criminal Activity

Has the governing member been convicted of serious criminal activity which is defined in section 10(1) as "serious criminal activity means any offence involving fraud, violence, or harm to children, any sexual offence, or any crime involving dishonesty".

No

Bankruptcy and Director/Promoter Prohibitions

Has the governing member been

- adjudicated bankrupt under the Insolvency Act 2006?
- prohibited from being a director or promoter of, or being concerned or taking part in the management of,
 - o a company under the Companies Act 1993 or
 - o any other body corporate?

No

Interventions in Other Charter Schools

Has an intervention been applied in relation to another charter school of which the person is or was a governing member of the sponsor?

No

Breaches of Statutory Duties

Has the person committed a serious or repeated breach of their statutory duties as a governing member of the sponsor?

No



Charter School Agency

Form B. Governing Members Statutory Declaration Form

To be completed by all persons who are governing members of the proposed sponsor.

**Other Relevant
Matters**

Are there any other factors or
concerns that should be considered in
assessing the governing member's
fitness and propriety?

No

DECLARATION

I make this solemn declaration conscientiously believing the same to be true and by virtue of the Oaths and
Declarations Act 1957.

Governing member
Signature:

[Signature]
Pakaraka.

Declared at:

Official Witness
Name

Irene Dorothy Armstrong JP.

Official Witness
Signature

[Signature]

Date:

9/12/2025.

Irene D. Armstrong
NZ Justice of the Peace
No. 7014



Charter School Agency

Form B. Governing Members Statutory Declaration Form

To be completed by all persons who are governing members of the proposed sponsor.

I Denise Anna

of 9(2)(a)

being a governing member for Pakaraka school

in my capacity as Board Member

understand that the following information is required for the determination of whether the governing member is suitable to be involved in the management and operation of the proposed charter school | kura hourua. This information is required as outlined in the draft legislation to amend the Education and Training Act 2020 to enable the establishment of the charter schools | kura hourua model.

Where I have answered in the affirmative to any of the following points, I have attached all the relevant details in relation to the matter.

I solemnly and sincerely declare that all my answers to the following questions are true and correct.

Serious Criminal Activity

Has the governing member been convicted of serious criminal activity which is defined in section 10(1) as "serious criminal activity means any offence involving fraud, violence, or harm to children, any sexual offence, or any crime involving dishonesty".

No

Bankruptcy and Director/Promoter Prohibitions

Has the governing member been

- adjudicated bankrupt under the Insolvency Act 2006?
- prohibited from being a director or promoter of, or being concerned or taking part in the management of,
 - o a company under the Companies Act 1993 or
 - o any other body corporate?

No

Interventions in Other Charter Schools

Has an intervention been applied in relation to another charter school of which the person is or was a governing member of the sponsor?

No

Breaches of Statutory Duties

Has the person committed a serious or repeated breach of their statutory duties as a governing member of the sponsor?

No



Charter School Agency

Form B. Governing Members Statutory Declaration Form

To be completed by all persons who are governing members of the proposed sponsor.

**Other Relevant
Matters**

Are there any other factors or
concerns that should be considered in
assessing the governing member's
fitness and propriety?

No

DECLARATION

I make this solemn declaration conscientiously believing the same to be true and by virtue of the Oaths and
Declarations Act 1957.

Governing member
Signature:

Yes

Declared at:

Rikaraka

Official Witness
Name

Irene Dorothy Armstrong

Official Witness
Signature

Date:

9/12/2025

Irene D. Armstrong
NZ Justice of the Peace
No. 7014



Charter School Agency

Form B. Governing Members Statutory Declaration Form

To be completed by all persons who are governing members of the proposed sponsor.

I Rakesh Shervyn Lal Pinao

of 9(2)(a)

being a governing member for Pakoraka School

in my capacity as Board Member

understand that the following information is required for the determination of whether the governing member is suitable to be involved in the management and operation of the proposed charter school | kura hourua. This information is required as outlined in the draft legislation to amend the Education and Training Act 2020 to enable the establishment of the charter schools | kura hourua model.

Where I have answered in the affirmative to any of the following points, I have attached all the relevant details in relation to the matter.

I solemnly and sincerely declare that all my answers to the following questions are true and correct.

Serious Criminal Activity

Has the governing member been convicted of serious criminal activity which is defined in section 10(1) as "serious criminal activity means any offence involving fraud, violence, or harm to children, any sexual offence, or any crime involving dishonesty".

NO

Bankruptcy and Director/Promoter Prohibitions

Has the governing member been

- adjudicated bankrupt under the Insolvency Act 2006?
- prohibited from being a director or promoter of, or being concerned or taking part in the management of,
 - o a company under the Companies Act 1993 or
 - o any other body corporate?

NO

Interventions in Other Charter Schools

Has an intervention been applied in relation to another charter school of which the person is or was a governing member of the sponsor?

NO

Breaches of Statutory Duties

Has the person committed a serious or repeated breach of their statutory duties as a governing member of the sponsor?

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Charter School Agency

Form B. Governing Members Statutory Declaration Form

To be completed by all persons who are governing members of the proposed sponsor.

**Other Relevant
Matters**

Are there any other factors or
concerns that should be considered in
assessing the governing member's
fitness and propriety?

NO

DECLARATION

I make this solemn declaration conscientiously believing the same to be true and by virtue of the Oaths and
Declarations Act 1957.

Governing member
Signature:

Declared at:

Pukekohe.

Official Witness
Name

Irene Dorothy Armstrong

Official Witness
Signature

Date:

9/12/2025

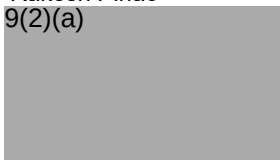
**Irene D. Armstrong
NZ Justice of the Peace
No. 7014**

6. Ministry of Justice Checks

27/07/2026

Rakesh Pinao

9(2)(a)



Dear Rakesh Pinao,

Request for a conviction check for Rakesh Pinao

Supplier request ID: W0H98JSDL

Thank you for your request of 27/07/2026.

You have no convictions based on the following information you provided :

Name: Rakesh Sherwyn Lal Pinao

Other names provided: Rakesh Sherwyn Lal

Date of birth: 29/08/1981

Gender: M

Yours sincerely



Criminal Records Unit

For more information about conviction checks, please go to justice.govt.nz/criminal-records



E: cchonline@justice.govt.nz

29/07/2026

Christiane Riegger

9(2)(a)

Dear Christiane Riegger,

Request for a conviction check for Christiane Riegger

Supplier request ID: W0H98FWD3

Thank you for your request of 29/07/2026.

You have no convictions based on the following information you provided:

Name: Christiane Claudia Brigitte Riegger

Other names provided:

Date of birth: 29/01/1958

Gender: F

Yours sincerely

Criminal Records Unit

For more information about conviction checks, please go to justice.govt.nz/criminal-records

26/06/2026

Denise WEDDING

9(2)(a)



Dear Denise WEDDING,

Request for a conviction check for Denise WEDDING

Supplier request ID: W0H9820WL

Thank you for your request of 26/06/2026.

You have no convictions based on the following information you provided :

Name: Denise Anna WEDDING

Other names provided:

Date of birth: 26/07/1978

Gender: F

Yours sincerely



Criminal Records Unit

For more information about conviction checks, please go to justice.govt.nz/criminal-records

27/07/2026

Fiona Murray

9(2)(a)



Dear Fiona Murray,

Request for a conviction check for Fiona Murray

Supplier request ID: W0H98JVS1

Thank you for your request of 27/07/2026.

You have no convictions based on the following information you provided:

Name: Fiona Christine Murray

Other names provided:

Date of birth: 22/09/1981

Gender: F

Yours sincerely



Criminal Records Unit

For more information about conviction checks, please go to justice.govt.nz/criminal-records

23/06/2026

Marcus Powell
9(2)(a)



Dear Marcus Powell,

Request for a conviction check for Marcus Powell

Supplier request ID: W0H98WGHC

Thank you for your request of 23/06/2026.

You have no convictions based on the following information you provided :

Name: Marcus Harman Powell

Other names provided:

Date of birth: 07/07/1979

Gender: M

Yours sincerely



Criminal Records Unit

For more information about conviction checks, please go to justice.govt.nz/criminal-records

7. CSA Assessment Panel Assurance Report

This assurance report summarises the Charter School Agency's assessment of Society of Holistic Learners Trust's application to convert Pakaraka School into a charter school.

Compliance check

Item	Status
Business/sponsor details provided	☒
Sponsor is a legal entity	☒
School details provided	☒
All questions responded to	☒
Application declaration signed	☒
Statutory Declarations submitted for all governing members	☒
Criminal checks complete	☒
Due diligence documentation completed	☒
Evidence of meaningful wider community consultation	☒
Secretary for Education (MOE) view considered	☒
Chief Review Officer (ERO) view considered	☒

Assurance Process

- a) The Agency reviewed the written application, undertook some due diligence and engaged with representatives of the Trust.
- b) Subject matter experts (SMEs) provided feedback on the application.
- c) The Assessment Panel considered the application, SME views and information gathered through due diligence.

Summary view

The assessment panel considers the Society of Holistic Learners Trust's application viable.

Application Assessment

Assessment ratings are: unknown, not viable or viable

Criteria	Description	Rating	Comments
Purpose and Contribution	Defined vision and educational features.	☒ Viable	
	Supporting parental choice / enhancing learning opportunities.	☒ Viable	
	Impact and contribution are positive for students and the wider school network.	☒ Viable	
	Purpose and contribution articulate clear drive to deliver a school of choice with a point of difference that: Outlines the immediate positive impacts for student cohort. Offers a school option that will influence families to choose this school over others.	☒ Viable	
	Education strategy is compelling and clearly articulated demonstrating that it is child centric.		

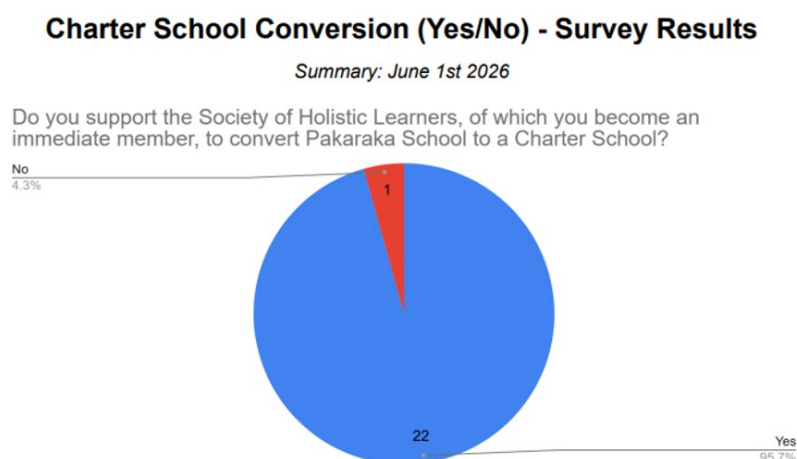
Business Planning	Demonstrate financial acuity and sustainability	☒ Viable	Growth will be sponsors responsibility, No concerns with current state viability, discretionary growth at determination of sponsor.
	Clear strategy for workforce and employment	☒ Viable	
	Clear asset strategy	☒ Viable	
	Comprehensive plan outlines clear, detailed strategies to deliver academic objectives: Detailed profit/loss balance (P&L) sheets for three consecutive financial years (from opening) with comprehensive operational line detail included and sound strategy to operate with financial sustainability. Detailed and strategic workforce planning approach outlined for workforce and day-to-day employment matters. Assets well known with a clear maintenance plan for upkeep over the contract term.	☒ Viable	

Sponsor Capability	Governance and leadership structure and strategies. Community engagement planning and activities Capability of the sponsor is demonstrated through governance, leadership and connection to their community: Detailed approach to organisation structure and strategies for governance and leadership to positively influence student achievement. Demonstrates a connectedness to community shown through meaningful community engagement to inform decisions and build trust with the community.	☒ Viable ☒ Viable ☒ Viable	SOHL has provided a governance structure that provides support for the person championing the conversion process.
Readiness to meet Performance Management outcomes	Readiness to transition. Performance outcomes to meet academic objectives. Demonstrates a readiness to meet contract, performance and establishment needs: Students can be healthy, happy and safe in their learning on day one of opening. Clear strategy to monitor and meet the contracted performance measures. Clear drive to improve academic achievement and attendance with detail strategies, programmes of initiatives to support this.	☒ Viable ☒ Viable ☒ Viable	Growth to a composite school will be considered following an assessment of the sponsor's capacity to provide for senior students and implemented through a variation to the contract.
Application viability	Satisfaction the application is viable.	☒ Viable	

8. Community consultation by proposed sponsor and Authorisation Board

Consultation by sponsor

SOHL has undertaken meetings and run a survey as reported in the OOC paper.



Authorisation Board consultation

The Authorisation Board delegated consultation to the Chief Executive on 21 July 2026.

The Charter School Agency Chief Executive undertook consultation at Pakaraka School on 28 July 2026.

The Authorisation Board's online survey went live on 21 July 2026 and was closed on 3 August 2026.

Twenty-five responses were received¹. This is higher than the engagement received when the Authorisation Board surveyed the community in November 2025.

64% of respondents skipped to the questions ie did not click through to read more about the Board's consultation. This indicates respondents were already feeling well informed.

The school community was also invited to email the charter school agency through applications@charterschools.govt.nz. No emails were received.

¹ In the survey in November for the previous sponsor nine responses were received for the Authorisation Board online survey and no emails were received.

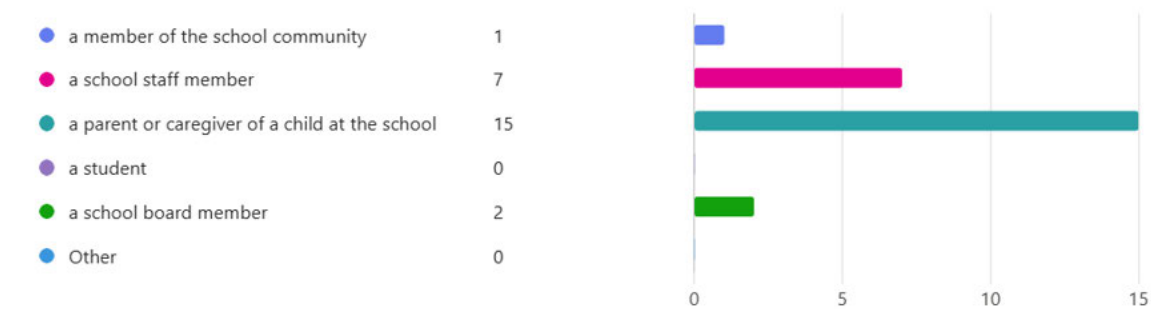
In-person consultation results:

28 July 2026 Timings	School community group	Overall summary	Feedback
Midday-12:30pm	Non-teaching staff and teacher aides	A good understanding of what being a charter school would mean for them and the school. Evidence of good engagement with the school board and proposed sponsor. Good engagement and questions	Comments • Happy for the school which will continue to be free and accepting of all. • Happy from an individual perspective, ie as a staff member. • Had several meetings about it in 2025 and met with Authorisation Board. • Keen to maintain the Steiner focus, discussed how that could be described. • Benefits they see in the model: • Each child in own time, not rushed • Mixing of children from different backgrounds, working well together. • More inclusive • Change of sponsor: • Feels the same – same people • Not nervous Questions on: • leave provisions. Discussion on: • They don't want to lose the essence of the school – importance of music and something for every child.
12.30-1:00pm (lunch hour)	Six teaching staff	Good engagement and questions.	Comments • All on board for the curriculum changes – already delivering that and it works best for their students. • Local union staff have been supportive. • Too much box ticking and too much prescriptive requirements in current system. • Had asked questions previously of the sponsor/school board and had these adequately resolved. Questions on: • What happens to the school's status if the government changes. Concerns about publicity: • Focus of attention. • Still want to be able to get on and teach. Discussion on: • A plan to deal with the publicity and attention of being the first converting charter school – sponsor and CSA to work together. • Process if unions negotiate changes to the collective agreement and if/how that would flow through to the staff. • Whether the staff consider they would lose anything by no longer having a school board – no, as they have the college of teachers – formalised and protected. Being Steiner “inspired” rather than a Steiner school – CEANZ looking at new levels of membership.
1:10-2:00pm	Senior students (approximately 15 students)	Confident students who could articulate what they liked at school and what innovations they'd like.	Some things they liked most about the school: • Swimming • Reading • Drawing Playing with friends

2:00-3:00pm	School parents – some in the staff room most at the school gate at pick up time	Parents supportive of the current direction of the school. Parents are aware of the proposed conversion, feel well informed and are either excited by it or neutral.	Comments • Love what the school is doing now and want them to do more of it. • Don't want the school to go back to a narrow delivery of education. • Moved the family of Whangarei so children could go to school here. • Child is very happy and doing well. • Hopes secondary school option will be operational by the time their child gets too old to attend Pakaraka School. • Happy the school board is setting up the Trust and will continue to manage the school. Questions on: • What is the process for making it happen? • What happens to the school's status if the government changes. Discussion on: • School zone Next steps towards conversion
3:30-4:30pm	Pakaraka School board – four members present including the staff representative	Very supportive of the transition Informed questions	Comments: • The board has already received offers of support from existing charter schools. • attendance Questions on: • Continuing school lunches or if cashed up? • If the government imposes a requirement for all schools, and provides funding to support the change, are charter schools funded? Concerns about subleasing and property management: • Focus is education, not in asset / property management. • Access to a classroom onsite, currently occupied by RTLb, when need it for roll growth – nearly at that point. Discussion on: • The need to agree terms of property lease. • The reliance on one person to get to this point, rest of board advised they would step up in the future and confirmed the board operates under a collective decision-making approach. • No perceived challenges in moving from a board to a sponsor – rather it allows a greater sense of ownership and more opportunity for a legacy to be built. • SOHL's ability to run a successful charter school – the Trustees have discussed. and made provision for: • Building a more sustainable system and a process of renewal of trustees • Accessing specialist services such as financial advice and payroll • Expanding the administrator role to an office manager • Seeking advice and support for property issues • Exploring options to ensure they can meet their reporting obligations for performance measures.

Authorisation Board online survey results:

Question: Are you responding to this survey as:



Question: Do you support your school converting to a charter school?



Question: Do you have any extra comments to add?

- 100 % behind this. Becoming a charter school will help flourish the learning experience for the children.
- Can't wait
- As a Family we fully support the move to convert to a Charter School
- Converting to a charter school will be beneficial for everyone involved. This will give us the autonomy to enhance the learning opportunities of our children and base their education on the Steiner pedagogy. The sponsors are committed to creating a thriving school and community.
- Will bring more diversity to our school
- Very excited for this to happen
- I support the conversion to a charter school because I believe it provides an opportunity to better meet the needs of our learners, whānau, and community. The increased flexibility around curriculum, staffing, governance, and programme delivery will enable the school to develop innovative approaches that reflect local aspirations, strengthen cultural identity, and improve educational outcomes. I also believe that the accountability framework for charter schools is important. Greater autonomy should be matched with clear expectations, transparent reporting, and measurable outcomes for students. From what I have seen, the consultation process has been undertaken openly and in good faith, with opportunities for the community to ask questions and provide feedback. Ultimately, I see this as an opportunity to create a school that is responsive, future-focused, and centred on the success and wellbeing of every learner

Question: Do you support the proposed sponsor?



Question: Do you have any extra comments to add?

- Yes they are all a very dedicated team with the children learning.
- Awesome board. 100% on board. Let's get it done.
- We are very fortunate to have such capable, enthusiastic individuals in the trust to act on our behalf.
- I support its role in this application because it was established to ensure that decision-making remains with people who are deeply connected to the school, its learners, and the wider community. The intention has always been to create a governance model where the vision and direction of the school are driven locally, with accountability to both the charter agreement and the community it serves. I believe this structure provides the opportunity to build an innovative, values-led educational environment while remaining responsive to the aspirations of whānau and the unique needs of our learners. The sponsor has been formed with a long-term commitment to educational excellence, strong governance, and positive outcomes for students, rather than short-term interests. For these reasons, I have confidence in SOHL as the proposed sponsor and believe it is well placed to guide the future of the school.
- I'm passionate about SOHL and it's ethos and am excited for us to be able to realise it's vision.
- Our board who are professional, supportive and work so hard to make our school the best place it can be for our kids. They have done the hard yards for us and our kids, and always put the school first and foremost.

8. Education Review Office Views



3 July 2026

Justine Mahon
Board Chair
Charter Schools Authorisation Board | Te Poari Whakamana Kura Hourua

Charterschool.agency@charterschools.govt.nz

Dear Justine,

Advice on converting schools

The Authorisation Board must seek the views of the Chief Review Officer on the matters set out in subsections (1) and (2), and in the case of converting schools, the performance of the State school (Education and Training Amendment Bill s212l).

In December 2025, ERO provided views on an application to convert Pakaraka School to a Charter School | Kura Hourua. At that time, the sponsor was the 9(2)(ba)(ii)

On behalf of the Charter School Authorisation Board | Te Poari Whakamana Kura Hourua, you have requested an updated view from the Education Review Office (ERO) on Pakaraka School. This request is due to the applicant sponsor now being the Society of Holistic Learners (SOHL) due to the withdrawal of 9(2)(ba)(ii).

I note that the judgements we have formed are based on the recent performance of this school and this is not necessarily indicative of likely performance going forward under different governance, financing, staffing and operating conditions.

Pakaraka School, Profile number: 1073

ERO's updated comment on the performance of this state school:

Pakaraka School is a very small Year 1 to 8 school in Northland. The school's total roll was 53 in 2025. This was an increase from 35 students in 2024. A small majority of learners (51%) identify as Māori. This is down from 77% in 2024. The number of European/Pākehā learners has substantially increased from 17% in 2024 to 40% in 2025. SOHL's application credits "the influx of Steiner interested parents" and the school's "known aspirations as a Charter School" (p. 2) for the increased roll.

ERO has had no scheduled engagement with Pakaraka School since our December 2025 views were shared with your agency. ERO published a Profile Report on this school in May of 2024 and, due to ongoing concerns, undertook further engagement in October 2025, which is reflected in the following comments. The 2024 ERO Profile report identified the following agreed improvement focus priorities:

- the Board reviewing the strategic plan, goals and actions to include the aspirations of Ngāti Hine for their tamariki
- providing professional learning that will support teachers to accelerate learning in literacy
- schoolwide achievement information that is regularly collected, analysed and evaluated

Ko te tamaiti te pūtake o te kaupapa. The child — the heart of the matter

- teachers using appropriate assessment tools that provide reliable information to inform next steps in teaching and learning.

Governance and Leadership

In October 2025, leadership was unstable following the long-serving teaching principal's departure in June 2025. Two acting co-principals shared the leadership of the school for the rest of 2025. ERO's understanding is that a new Principal began at the school at the start of the 2026 school year.

School Performance and improvement focus

The then school leaders and the Board had yet to address the identified priorities for improvement from the 2024 ERO Profile report. The improvement priorities were only partially reflected in the school's 2025 annual implementation plan. Leaders had not been reporting on the progress of the annual plan to the Board. Leaders' reporting had omitted essential updates on student achievement, wellbeing, and attendance - key indicators of school performance. ERO is unable to comment on the quality of planning for 2026 as we have not had scheduled engagement.

Academic Performance Concerns

Schoolwide achievement information was yet to be regularly and consistently collected, analysed and evaluated. This lack of reliable information severely limited the school's ability to make informed decisions and improve outcomes.

Key next steps for improvement identified in the October 2025 progress check

- leaders and the Board to develop and implement a formal attendance plan and monitor progress and improvement termly
- leaders and teachers to gather accurate and reliable end of year school wide achievement information, report this to parents and the Board. Teachers should use this information to inform term one 2026 teaching and learning programmes
- the new principal needs to establish relational trust at all levels of the school community and set and pursue appropriate improvement-focused goals and targets.

Community and Network Impacts

This proposal represents a shift in educational philosophy, teaching methodology, curriculum, and school type.

The Sponsor, the Society of Holistic Learners, remains committed to adopting a Steiner approach for this school. A Steiner-inspired classroom operated on the Pakaraka School site for 2024. This closed due to financial difficulties and those students were mainstreamed into Pakaraka School in 2025 – contributing to the school's roll growth. It will be important to check how representative the required community consultation has been.

It is proposed to grow the school to accommodate learners up to Year 13. ERO questions whether there are sufficient secondary school students seeking a Steiner education in the local area. Secondary schools with small rolls can offer limited subject breadth, particularly in the senior school. ERO notes that SOHL's application additionally proposes the future establishment of a satellite campus. ERO suggests that the Charter School Agency investigates the viability and sustainability of extending the school to Year 13.

Approval would disrupt the local schooling network. Those families not wishing a Steiner education for their children would need to travel long distances for alternatives. With an equity index of 521 - in the highest range - most students face significant socioeconomic barriers, limiting their ability to choose and access other schools.

ERO suggests the Charter School Agency tests the level of community support for this change, particularly among the school's predominantly Māori community.

- Please consider these factors (see below).

ERO supporting judgements:

School Improvement Framework Core Domain	Judgement	Comment
Learner success and wellbeing	Working towards	Learner attendance, progress and achievement is of concern (refer to data summary attached)
Leadership	Working towards	Efforts are being actively made to put in place key elements of the School Improvement Framework, but there is variability, or they are not embedded.
Curriculum	Working towards	Efforts are being actively made to put in place key elements of the School Improvement Framework, but there is variability, or they are not embedded.
Teaching and learning	Working towards	Efforts are being actively made to put in place key elements of the School Improvement Framework, but there is variability, or they are not embedded.

Actions for compliance previously identified:

- Board Assurance with Regulatory and Legislative Requirements:
 - Yes
 - An up to date set of school policies and procedures framework is not readily available to the school community or Board members. A schedule of regular review is required to ensure compliance with legal and regulatory requirements [Education and Training Act 2020]. The Board has since taken steps to address this area of non-compliance.

Most recent ERO report:

[Pakaraka School | Education Review Office](#)

School data summary:

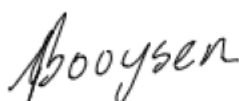
Attached

Governing members of the Society of Holistic Learners:

Governing member	Fit and Proper Person declaration*	ERO comment or view on this person
Fiona Christine Murray	Yes	ERO's records indicate that these people are members of the Pakaraka School Board.
Marcus Harman Powell	Yes	
Denise Anna	Yes	
Christiane Claudia Brigitte Riegger	Yes	ERO's records indicate that Christiane Riegger was head teacher of Oromahoe Kindergarten in 2023. The organization providing governance and support to this kindergarten was the Bay of Islands Waldorf Education Trust (BOIWET). ERO's records indicate that she is a member of the Pakaraka School Board.
Rakesh Sherwyn Lal Pinao	Yes	ERO's records indicate that Rakesh Pinao is the Presiding Member of the Pakaraka School.

*Provided by the Charter School Agency

Ngā mihi



Shelley Booyesen

Deputy Chief Executive, Review and Improvement Services

Description of ERO's judgement terms

ERO's judgements are based on [the School Improvement Framework](#)

Excelling	Indicates that all key aspects are embedded and sustained, and the school is demonstrating innovation and contributing knowledge and expertise across the sector
Embedding	Indicates that key aspects are in place and there is a focus on integrating these across the school.

Working towards	Indicates that efforts are being actively made to put in place key aspects but there is variability, or they are not embedded.
Improvement required	Indicates that key aspects are not present or not working effectively and urgent improvement is required to support learner success and wellbeing.

10. Ministry of Education Views

01 July 2026

Tēnā koe Sean,

I am writing to provide the views of the Ministry of Education (the Ministry) on the application from:

- The Society of Holistic Learners (SOHL) to convert Pakaraka School to a Charter School, as requested via email on 21 November 2025

The Education and Training Act 2020 (the Act) requires that when deciding whether to approve a proposed sponsor, the Authorisation Board (the Board) must seek the views of the Secretary on the matters set out in subsections (1) and (2) of section 212(l) of the Act – Authorisation Board may approve sponsor¹. The summary of views has been provided in tabular form (Appendix 1).

I have provided a view only where the Ministry holds information considered relevant to any of the points set out in your request letter. The information provided is limited to information that is already held by the Ministry, and that was readily retrievable from our records. We did not seek or create new information.

I note that the summary of information reflected in this document includes some views that were conveyed in our feedback to the last application related to Pakaraka School, dated 4 December 2025.

Next steps

The Authorisation Board can request further information from the Secretary on these matters if required as its assessment process progresses. This would include any other matters the Board considers relevant where views have not yet been sought.

Nāku noa, nā



Vince Fallon,
Acting Group General Manager, Operational Standards and Support, Te Mahau

¹ Section 212(l) of the Education and Training Act 2020 (Appendix 2).

Appendix 1 - Views on converting school (June 2026)

Proposed School: Pakaraka School #1073

Sponsor: The Society of Holistic Learners (SOHL)

Ministry of Education Region: Tai Tokerau

Current school board members	View on proposed sponsors and governing members being fit and proper persons	View on financial implications for the Crown	View on the proposed focus of the charter school	View on the level of support for the proposed charter school and/or sponsor from the community in which it is proposed to be established, staff and students.	View provided by School Property	View on whether the purpose in section 32(e) would be achieved if the proposed charter school is established
Rakesh Pinao (Board Member and Presiding Member) Christiane Riegger (Board Member) Marcus Powell (Board Member) Denise Anna (Board Member) Fiona Murray (Board Member) Patricia Simeon (Principal)	Per the application, the Society of Holistic Learners (SOHL) is the new sponsor and a brand-new entity created after the breakdown of the original sponsorship, with the aim to remove governance risk and carry the conversion forward. The application indicates that the SOHL Trust Trustees are the current Pakaraka School Board of Trustees The Ministry holds little knowledge of the capability of the proposed sponsor or the governing members being fit and proper persons and is not aware of engagement undertaken by the sponsor including consultation with parents. The Ministry is aware that the wife of the Chairperson of SOHL and current Presiding Member of the school, is one of	Per the Ministry's views on the previous application, it was deemed that with 53 students (as of July 2025) on the initial role, Pakaraka was likely to receive less resourcing as a charter school, potentially indicating overall savings for the Crown. This is because, in the charter schools funding model, "base" components are converted to higher per student rates for the first 100 primary school students and are only fully paid out once that roll is achieved. If the school becomes a composite and grows significantly, as indicated in the EOI, there will be an increase in the funding rates and roll, likely costing more than the school does at present. For a more complete picture we suggest modelling the potential roll and funding changes, and also looking at school transport costs and the eligibility of the students the	Per the Ministry's views on the previous application, we suggest checking compliance with s212K(1)(b) and (c), which relate to schools adopting a special character. Education with a special character is described in the Act as "education within the framework of a particular or general religious or philosophical belief and associated with observances or traditions relating to that belief" (see s10). Possible issues from the community about the general philosophical change of the school may mean that some students may not want to attend their local school. The Ministry is aware that the new Principal is keen to introduce some changes. While her focus is set to remain on Steiner philosophy on transition to Charter School, she wants to	Per the Ministry's views on the previous application, Pakaraka School comprises a small rural community whose teaching and learning has improved in recent years. The Ministry is not aware of the level of engagement undertaken by the sponsor at this stage. The general view of the Ministry is that since February 2026, the school seems to be on stable ground, especially with regard to the staffing environment.	Per the Ministry's views on the previous application, the overall condition of the property at this school was rated "average - poor" in a 2023 assessment. The school is 3 years into their 5YA cycle. The school currently has 3 teaching spaces. There is additionally a building of classroom size which has been refurbished to office space for the purpose of RTLB. The RTLB office is essential for the local network and is being used as a 'hub' for multiple RTLB teachers (i.e., other offices have closed and been consolidated at the Pakaraka School RTLB office). As part of the application, there has been reference to 4 teaching spaces, possibly on the assumption that the RTLB space will be converted back to teaching space. The Ministry view is that this should not happen. Current school 'actual and entitlement' is 3 teaching spaces. If the RTLB office needs to move, there will need to be a 3-year relocation plan, along with capital investment for new space elsewhere.	Pakaraka School is a small school in the rural mid-north of Tai Tokerau. There are other English medium schools within the area that the local students can enrol at including Ohaewai School, Oromahoe School and Moerewa School. Oromahoe School is at capacity and has an enrolment scheme. The other schools are not at capacity, do not have an enrolment scheme and as such are able to enrol any student. Most of the students in the Pakaraka area enrol through the out of zone ballot at Oromahoe Primary. Should Pakaraka school change designation to a charter school there will be a minor impact to the schooling network. There is a Steiner Kindergarten in Oromahoe that would feed into Pakaraka School and this pathway may reduce the demand for Oromahoe School.

	the lead teachers who has been advocating for Steiner philosophy (Geraldine Pinao – Deputy Principal). Governing Members: Rakesh Pinao - Trustee and Chairperson Christiane Riegger – Trustee Marcus Powell – Trustee Denise Anna – Trustee Fiona Murray – Trustee 9(2)(g)(i), 9(2)(a) The permanent appointment of a new Principal was made in February 2026. The new person is from the area and has spent many years working with Education.	school wishes to attract from further afield. Per the 11 March 2026 roll, the school has 65 students. As context, the Ministry is aware of the variation in roll numbers in the last few years, with 78 at its peak and 36 at its lowest. Rather than speak to a roll decline due to the proposed transition, the variation is generally ascribed to the school increasing and decreasing its roll capacity based on demand for bespoke education and staffing capability at various points in time. The Ministry is also aware that Pakaraka school has experienced some financial trouble recently and has been advised to budget for deficit. However, the school is performing better financially now, although the Board may not be able to fund an additional teacher in 2027.	bring in a localised curriculum as well. This would enable the servicing of students who do not subscribe to or follow the Steiner philosophy. In this way, they won't be disadvantaged. However, the Ministry's position remains that in its present form as a state school, the implementation of Steiner philosophy is not allowed or encouraged. In the recent past, the Ministry has sought legal advice on the matter and notified the Presiding Member to this effect. The regularity of school visits was also increased. While not confident that the school has abided by this advice and stopped offering Steiner inspired education altogether, the Ministry has found no physical evidence to show that Steiner philosophy is being promoted. An ERO inspection is set to occur soon. The Ministry had recommended that this visit, which was scheduled to occur earlier, be deferred till the new Principal/Board were able to make appropriate changes.		The Ministry notes that Property negotiations were well advanced with the previous sponsor when their application was suspended. Property disclosure information had been provided and a transitional property plan for the first five years of operation had been agreed to. A draft lease had been submitted to the sponsor for feedback, but no response had been received. All this documentation is still available, as is, to support the new application as policy settings and the school's property assets remain the same.	The nearby Kawakawa School has also grown in popularity and is currently at full capacity. Pakaraka School is perceived by parents as a transitional school, given the availability of other nearby options.
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Appendix 2 - Section 212I (3) of the Education and Training Act 2020

Approval of sponsor

212I Authorisation Board may approve sponsor

General criteria

- 1) The Authorisation Board may approve a sponsor to operate a charter school if satisfied that the proposed sponsor and every governing member of the proposed sponsor are fit and proper persons (after considering the criteria set out in [section 212J](#)).
- 2) When deciding whether to approve a proposed sponsor, the Authorisation Board must take into account the following matters:
 - a) the focus of the proposed charter school:
 - b) the capability of the proposed sponsor, including—
 - i) its experience and knowledge of the New Zealand schooling system; and
 - ii) its financial and governance capability:
 - c) the standard of tuition to be provided by the proposed charter school, including—
 - i) the mode of curriculum delivery; and
 - ii) the regularity of instruction:
 - d) the financial implications for the Crown if the proposed charter school is established:
 - e) whether the purpose in [section 32\(e\)](#) would be achieved if the proposed charter school is established:
 - f) the level of support for the proposed charter school from the community in which it is proposed to be established:
 - g) any other matters that the Authorisation Board considers relevant.
- 3) The Authorisation Board must seek the views of the Secretary and the Chief Review Officer on the matters set out in subsections (1) and (2).

Additional criteria for converting schools

- 4) In the case of a converting school, the Authorisation Board must also take into account the following matters:
 - a) the performance of the State school:
 - b) the level of support from the school community, school staff, and students for the proposed sponsor:
 - c) the level of support from the school community, school staff, and students for the proposed conversion of the school to a charter school.
- 5) For the purpose of ascertaining the matters in subsection (4), the Authorisation Board—
 - a) must consult the school board, school community, school staff, and students; and
 - b) may consult any other person it thinks fit.

Section 212I: inserted, on 1 October 2024, by [section 41](#) of the Education and Training Amendment Act 2024 (2024 No 40).



11. Legislative authority for approval

The decision to approve a sponsor and convert a State school to a charter school is governed by Subpart 6A of the Education and Training Act 2020 (sections 212A–212ZH). The key authorising provisions are:

Section 212F – Application for approval to operate charter schools

- Establishes who may apply to operate a charter school, including:
 - a proposed sponsor, or
 - a school board (for converting schools) with the proposed sponsor’s support.
- Provides the statutory basis for The Society of Holistic Learners (SOHL) Trust in application in respect of Pakaraka School.

Section 212I – Authorisation Board may approve sponsor

This is the central provision empowering the decision.

The Authorisation Board may approve a proposed sponsor if satisfied that:

1. The sponsor and all governing members are *fit and proper persons* (per section 212J); and
2. The sponsor has the capability and capacity to operate a

charter school. For converting schools, the Board must *also* consider:

- The performance of the existing State school;
- The level of support from the school community, staff, parents, and students for:
 - the proposed sponsor; and
 - the proposal to convert.

Section 212J – Criteria for assessing whether governing members are fit and proper

Outlines mandatory checks, including criminal history, financial integrity, and conflicts of interest—forming part of the Board’s assessment process.

Section 212K – Conditions on approval

Allows the Board to impose conditions on the approval, including:

- Retaining the character of the converting school (if relevant);

Ensuring continuity of enrolment for existing students.

Section 212L – Charter school contracts

Upon approval, the Agency must enter into a contract with the sponsor that sets

- Performance requirements, reporting, and monitoring;
- Obligations relating to curriculum, student welfare, and financial accountability.

Section 212G – Minister may direct board to apply to convert a State school (if relevant)

Not used in this case, but forms part of the statutory framework for conversion.

Conclusion

Based on comprehensive consultation, robust assessment of the sponsor’s capability, and alignment with legislative requirements, the application by the SOHL Trust to convert Pakaraka to a charter school meets the statutory criteria under sections 212F, 212I, 212J, 212K, and 212L of the Education and Training Act 2020.

The Authorisation Board is therefore empowered under law to approve SOHL Trust as a sponsor and to approve the conversion of Pakaraka School.