



Performance Plan
relating to
Society of Holistic Learners for Pakaraka School
Charter School | Kura Hourua

Dated: September 2026

IN CONFIDENCE

Sponsor and Charter School Details

1.	Name of Sponsor	Society of Holistic Learners
2.	Name of Charter School	Pakaraka School

3.	Charter School Commencement Date	Refer to Conversion Date in Special Term #18
4.	Performance Plan last updated	September 2026

Background

- A. The Sponsor and the Charter School Agency (**Agency**) are parties to the Charter School Agreement referred to above.
- B. This Performance Plan forms part of, and is incorporated in, the Charter School Agreement.
- C. In this Performance Plan, capitalised terms not otherwise defined have the meaning given to them in the Agreement or the ETA.
- D. The Sponsor acknowledges that, as part of its Proposal and engagement with the Agency, the Sponsor has also provided the Agency with details of the steps and processes the Sponsor will adopt and implement to ensure that it complies with this Performance Plan.

Agreement

This Performance Plan applies to the Charter School and forms part of, and is incorporated in, the Charter School Agreement.

SIGNED by Charter School Agency,
acting for and on behalf of the Crown


Sean Teddy (Sep 16, 2026 17:40:35 GMT+12)

Authorised Signatory

Sean Teddy, Chief Executive

Print Name and Position

Sep 16, 2026

Date

SIGNED by Society of Holistic Learners


Rakesh Pinao (Sep 16, 2026 16:32:03 GMT+12)

Authorised Signatory

Rakesh Pinao

Print Name and Position

Sep 16, 2026

Date

PART A: PERFORMANCE PLAN

This Performance Plan covers the following Performance Outcome Areas:

Performance Outcome Areas



A. Student Outcomes

- Attendance
- Achievement



B. Financial Performance



C. Standard Minimum Compliance

- Regulatory compliance

Performance Outcome Area <i>Each area that is a focus of performance management</i>	Performance Target and Minimum Performance Thresholds for Charter School	Performance Outcome Measures and Reporting <i>Specific Measures used to determine whether the Performance Targets and Minimum Performance Thresholds have been achieved (e.g., tools and data).</i>
A: STUDENT OUTCOMES		
1. Student Attendance 	The standardised performance target is 80% of students regularly attending. Each Charter School is expected to show progression over time and work towards this target. Performance Target: 80% Minimum performance threshold: 35% The Minimum Performance Thresholds for Student Attendance may be updated by the Agency from time to time as EQI Bands change.	Daily attendance of Students in line with attendance regulations for State Schools. Progress within all attendance categories (regular attendance, irregular absence, moderate absence and chronic absence) will be considered when assessing a Charter School's performance.

2. Student Achievement 	Years 3 – 10 The standardised performance target for primary achievement (years 3-10) is 80% of all students at or above the expected curriculum level for their age in reading, writing and maths. Each Charter School offering years 3-10 is expected to show progression over time and work towards this target. Performance Target: 80% Minimum performance thresholds: • Reading: 30% • Writing and Maths: 25% Years 11-13 Performance Target and Minimum Performance Thresholds for Years 11-13 to be confirmed no later than the start of the school year in which year 11-13 students are being enrolled. The standardised performance target for secondary school achievement (years 11-13) is 95% of school leavers attaining NCEA Level 2 (or equivalent). The minimum performance thresholds is 65% for schools with more barriers (EQI Bands 6-7).	Student achievement at the same level of detail as State Schools, including reporting by gender, year level and ethnicity, as follows: <table><tr><th>Years 3 to 10</th><th>Years 11 and above</th></tr><tr><td> • Reading or pānui • Writing or tuhituhi • Mathematics or pāngarau </td><td rowspan="4"> Performance Outcome Measures and Reporting for Years 11-13 to be confirmed no later than the start of the school year in which year 11-13 students are being enrolled. </td></tr><tr><td> Initial assessment measures: • e-asTTle reading or pānui; writing or tuhituhi; and mathematics or pāngarau • New Zealand Council for Education Research’s (NZCER) Progressive Achievement Tests for reading comprehension and reading vocabulary; punctuation and grammar; and mathematics (English-medium only) • Te Waharoa Ararau for monitoring and reporting on student progress and achievement in pānui, tuhituhi and pāngarau </td></tr><tr><td> Sponsor will provide the Agency with access to school level data for e-asTTle and Te Waharoa Ararau. </td></tr><tr><td> If the Sponsor uses the NZCER Progressive Achievement Tests, the Agency and the Sponsor will agree how this data will be provided. </td></tr></table> Sponsor must report on years 3 to 10 twice a year (in both the End of Year Report and the Self-Audit Report) and only once a year for years 11 and above (in the Self-Audit Report). Progress in all areas will be considered when assessing a Charter School’s performance	Years 3 to 10	Years 11 and above	• Reading or pānui • Writing or tuhituhi • Mathematics or pāngarau	Performance Outcome Measures and Reporting for Years 11-13 to be confirmed no later than the start of the school year in which year 11-13 students are being enrolled.	Initial assessment measures: • e-asTTle reading or pānui; writing or tuhituhi; and mathematics or pāngarau • New Zealand Council for Education Research’s (NZCER) Progressive Achievement Tests for reading comprehension and reading vocabulary; punctuation and grammar; and mathematics (English-medium only) • Te Waharoa Ararau for monitoring and reporting on student progress and achievement in pānui, tuhituhi and pāngarau	Sponsor will provide the Agency with access to school level data for e-asTTle and Te Waharoa Ararau.	If the Sponsor uses the NZCER Progressive Achievement Tests, the Agency and the Sponsor will agree how this data will be provided.
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If the Sponsor uses the NZCER Progressive Achievement Tests, the Agency and the Sponsor will agree how this data will be provided.									

B. FINANCIAL PERFORMANCE		
3. Financial performance 	The standardised performance targets are: - Operating surplus 2-5% - Working capital ratio 2:1 - Debt/equity ratio 0.5:1 - Operating cash: Positive cashflow forecast = actual - Enrolment variance: Contextual measure, assessed in reports as either: Growing, Stable, or Decreasing	Sponsor must report on the following Key Financial Performance Measures in each Annual Financial Statement and Mid-Year Financial Statement: operating surplus, working capital ratio, debt/equity ratio, operating cash, and enrolment variance. Refer to further detail in the Guidance Note on Financial Performance Reporting below in Part B(4). Converting Schools must provide any other reporting detailed in Schedule 3 of the Agreement.
C. STANDARD MINIMUM COMPLIANCE (SMC)		
4. Regulatory compliance 	Charter School's compliance with regulatory requirements in the following areas: - Employment of certificated teachers and LATs Standard Minimum Compliance measure: <i>Minimum of 75% of certificated teachers employed.</i> <i>All teaching positions not held by certificated teachers are held by people who hold a LAT.</i> - Reporting requirements Standard Minimum Compliance measure: <i>Compliance with reporting requirements as set out in the Performance Plan.</i>	

- Student enrolment requirements

Standard Minimum Compliance measures:

- *Compliance with requirements to accept all domestic enrolments, unless they meet any exceptions outlined in the Education and Training Act 2020*
- *Enrolment for existing students is protected at a converting school*
- *If applicable, enrolment complies with any distinguishing characteristic for the school approved by the Authorisation Board*
- *School roll does not exceed the physical capacity of the school as agreed in the Charter School Agreement*
- *Where enrolment applications exceed the number of places available, the school has complied with the enrolment priorities set out in the Education and Training Act 2020*
- *The enrolment of international students has been notified to the Ministry.*

- Insurance

Standard Minimum Compliance measure:

- *The Sponsor holds appropriate insurance cover at the minimum level agreed in their contract terms for the duration of the term of the Agreement.*

- School day, hours and term date requirements

Standard Minimum Compliance measure:

- *Compliance with school day, hours and term dates, as set out in Charter School Agreements.*

- Transport provision requirements (if applicable)

Standard Minimum Compliance measure (all schools):

- *Compliance with any and all relevant laws (including all regulations and bylaws) in relation to Transport services.*

In addition:

Schools utilising Ministry-contracted transport services:

- *a school bus controller is in place*
- *compliance with any arrangements between the Ministry and the school*
- *follows the relevant Ministry [School Transport roles and responsibilities guidelines](#)*

Schools receiving Charter School Transport Funding:

- *follows the relevant Ministry [School Transport roles and responsibilities guidelines](#)*
- *compliance with additional requirements as set out in their service specific Funding Agreement with the Ministry.*

	• Property Standard Minimum Compliance measures: • <i>Compliance with all applicable laws (including all regulations and bylaws) in relation to the ownership, use or occupation of, activities undertaken at, and/or otherwise affecting, the property (including all land and buildings/facilities) that a Charter School operates from. This includes, without limitation, the laws and regulations set out in Section 6.1: Legislation relating to property.</i> • <i>If applicable, a copy of accounts related to property fees, and the auditor's report, has been provided to the Agency.</i> The following reporting requirements are in addition to those required in sections A through C above (<i>Student Outcomes, Financial Performance, Standard Minimum Compliance Regulatory compliance</i>). The following reports will not be weighed against specific targets. Charter School's will be required to report on the following requirements in the form and by dates as notified by the Agency: • Baseline reporting for year 1 of operations • Reporting mid-year on secondary achievement • Reporting mid-year on progress towards performance targets • Reporting achievement data for students in year levels 0-2
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Guidance Note:



Charter Schools must comply with (and will be measured against) the Performance Targets set out in this Performance Plan for Student Outcomes (attendance and achievement) and Financial Performance. These Performance Targets are standardised across all Charter Schools. In the case of Student Outcomes, Charter Schools are required to work towards (and will be measured against) minimum performance thresholds (based on EQI). Performance Targets do not apply to SMC as non-compliance carries immediate risk to Students and/or operation of the Charter School.



Agency may take into account any relevant information available to the Agency and make relevant enquiries, for the purposes of setting, monitoring, assessing and updating the Performance Plan.

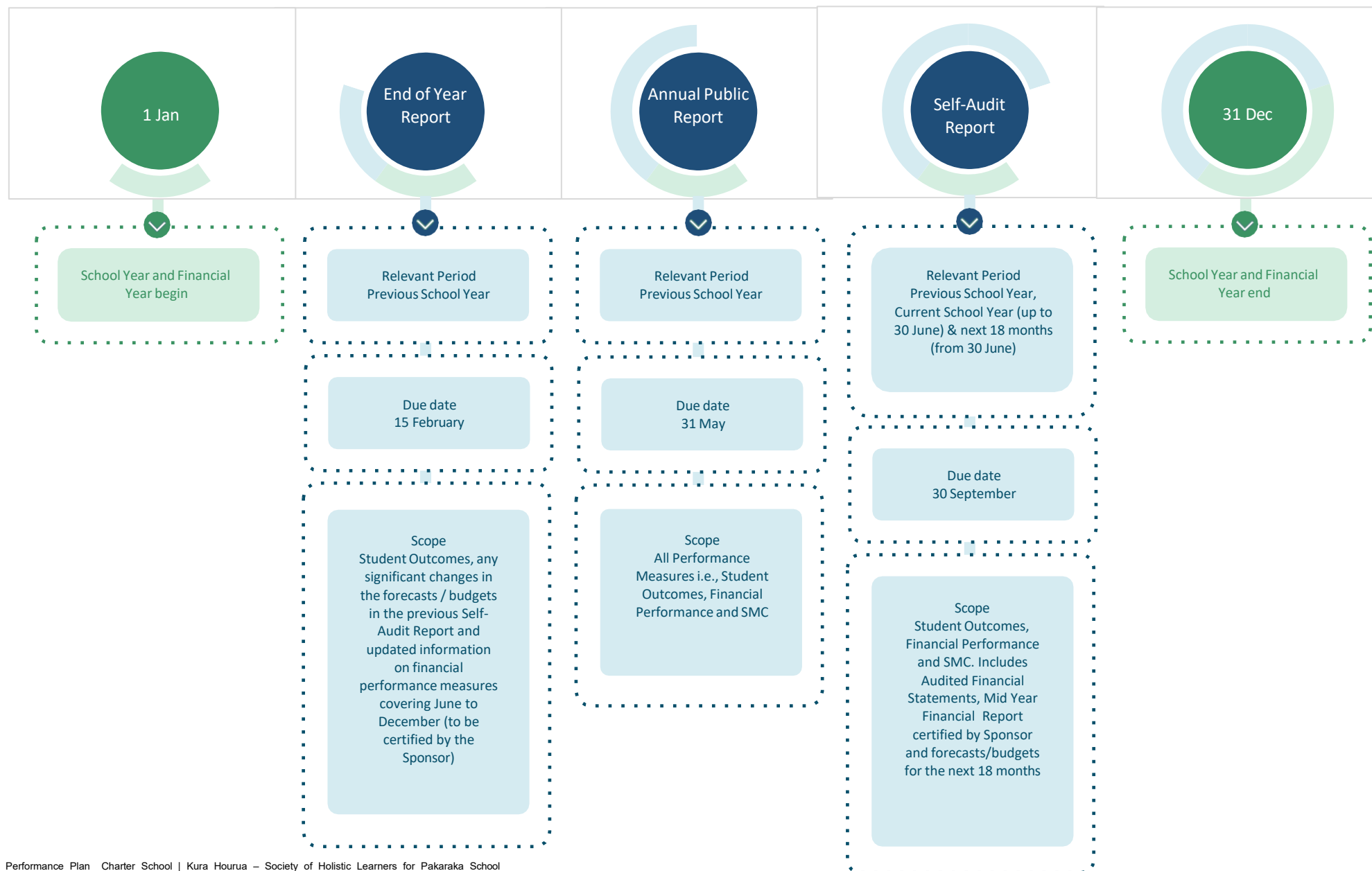


Agency may issue guidance to the Sponsor from time to time to supplement the Performance Plan.

PART B: PERFORMANCE PLAN REPORTING

The indicative reporting timeline is based on the default End of Financial Year (31 December), end of Annual Self Audit Report period (30 June) for Charter Schools and School Year of 1 January – 31 December. This timeline will be discussed with and may be tailored to each Charter School.

1. Indicative Timeline for Performance Plan Reports



2. Sponsor timeline for Performance Plan reporting

The Sponsor must provide the reports set out in the Indicative Timeline in Part B(1) by the deadlines specified the Indicative Timeline (or, if the Sponsor has not adopted default dates, by the deadlines for reporting set out in the table below).

Reporting: Key Dates (if default dates in Part B(1) above are not adopted by Charter School)			
1. End of Financial Year		3. Annual Public Report Due Date	
2. Annual Self Audit Report - End of Annual Self Audit Period - Annual Self-Audit Report Due Date		4. End of Year Report - Last date of End of Year Report Period - End of Year Report Due Date	

3. Form of Performance Plan Reports

The Sponsor must:

- (a) publish its **public annual report** on the Charter School website (or if that is not possible, in a regional newspaper circulating in the location of the Charter School)
- (b) provide all **other reports** to the Chief Executive of the Agency or in accordance with the Agency's directions

The Sponsor must comply with the form for reports required by the Agency. This may include:

- (a) **standard report templates**, with accompanying guidelines and instructions
- (b) an **on-line or electronic reporting system** including, if required by the Agency: (i) an electronic register of attendance that meets Ministry requirements; and (ii) the same roll returns and systems as State Schools
- (c) **supplementary information** reasonably requested by the Agency

4. Scope of Performance Plan Reports

Guidance Note on Financial Performance Reporting:



Annual Financial Statement must:

- be prepared in line with generally accepted accounting practice (as defined in section 8 of the Financial Reporting Act 2013)
- relate to the prior financial year for the Charter School
- be audited by a qualified auditor (within the meaning of section 35 of the Financial Reporting Act 2013)
- report against Key Financial Performance Measures (see above)



Mid-Year Financial Statement must:

- relate to the first six months of the current financial year (generally this is January to June)
- cover updated information on Key Financial Performance Measures (see above)
- be certified by the Sponsor (not required to be externally audited)



Key Financial Performance Measures cover the following:

- Operating surplus: measures the difference between revenue and expenditure, expressed as a surplus/deficit to total revenue percentage
- Working capital ratio: defined as *current assets less current liabilities*. Does not include any investments with a term of over 12 months or any trust fund investments
- Debt/equity ratio: defined as *debt / (debt plus net tangible assets)*
- Operating cash: measures all cash generated/reserves held by the School
- Enrolment variance: tracks the School's variance in enrolments over time

Report Requirements for the Performance Targets and Performance Outcome Measures	
A. Student Attendance 	Sponsor must report on Student attendance on both a daily basis and at the end of each term.
B. Self-Audit Report   	Sponsor must complete a Self-Audit Report that includes: • Student Outcomes: standard reporting on student achievement and attendance • Financial Performance (see further detail in Guidance Note on Financial Performance Reporting above): (i) Annual Financial Statement and Mid-Year Financial Statement (ii) detailed forecasts/budgets for the next 18 months, including detailed assumptions on expected use of funds, as well as any expected income, debt or liabilities that will arise (iii) attestation and disclosures for financial probity requirements (as set out in the Agreement or otherwise specified by the Sponsor) (iv) confirmation that all contractual obligations have been discharged before profit or dividends have been used by the Sponsor • confirmation that Sponsor has an appropriate policy for sensitive expenditure (e.g., expenditure that is beneficial to individuals or groups of individuals and/or considered unusual for the Charter School's purpose and/or functions) • Standard Minimum Compliance: (i) standard reporting on SMC requirements (ii) confirmation of compliance with contractual and legislative obligations relating to student wellbeing and child protection
C. End of Year Report  	Sponsor must report on: • Student Outcomes: standard reporting on Student achievement and attendance • disclosure of any significant changes in the forecasts/budgets included in the Self-Audit Report • updated information on financial performance measures covering June to December to be certified by the Sponsor
D. Public Annual Report    <i>Refer to section B(3) above for details on publishing Public Annual Report.</i>	Sponsor must report on all Performance Measures set out in this Performance Plan- i.e., Student Outcomes (including Student achievement and attendance), Financial Performance and SMC requirements

5. Updates to Performance Plan and Report Requirements

- 5.1 The Performance Plan will be reviewed and updated in accordance with the Performance Management Framework set out in the Agreement (Part 2).
- 5.2 The Authorisation Board or Agency may update the Performance Plan reporting requirements on notice to the Sponsor from time to time.
- 5.3 For clarity, the Sponsor must comply with the records and reporting requirements set out in Schedule 4 of the Agreement. In relation to the Performance Plan, this includes providing the Agency and Authorisation Board with any updates that they request in relation to the Sponsor's implementation of steps and processes to comply with this Performance Plan (referred to in the Background above).