



Application form for converting schools

Instructions for applicants

This form is only for converting school applications. If you are a new school, please head to our website to find the appropriate information and forms.

What you'll need to provide

1. A written response to our assessment criteria in this document.
2. Answer all questions.
3. Sign the application declaration at the end of this document.
4. If you have new governing members since completing your EOI, complete statutory declarations for all new governing members.
5. If you have any comments with regard to the draft contract, note in the section provided in this document.

Submitting your application

1. Applications should be submitted by email to applications@charterschools.govt.nz.
2. For applicants who want to open in February 2026, the last date to submit an application is by 5:00pm, 27 June 2025.
3. If you submit after this date, your application will still be accepted. But please note that submitting after this date may affect when your application is assessed and when you will be able to open.
4. If you do encounter technical issues when you are submitting, please contact the applications team at applications@charterschools.govt.nz.
5. Please clearly name your files as follows:
 - a. [Applicant/sponsor name – Application form for Charter Schools - Kura Hourua]
 - b. [Applicant/sponsor name – Statutory declaration for Charter Schools - Kura Hourua]

Application process terms and conditions

This process is undertaken in accordance with the Charter School Agency application terms and conditions. By applying, the applicant agrees to the terms and conditions appended to this application.



In the application document, we want to understand why you are choosing the charter school model for your school, and for you to demonstrate your capability to establish and operate a charter school.

If, as the applicant:

You are the sponsor who is proposing to convert the state school to a charter school.

→

Complete the application and sign the declaration as the sponsor.

OR

You are a member of the school community jointly proposing a conversion of your community's state school with a sponsor.

→

Complete the application jointly and each co-sign the declaration as the community member and the sponsor.

Aspiration to convert to a charter school

The requirements for this section are to demonstrate how converting from a state school to a charter school will benefit the school community and the students.

Aspiration to convert

1. In considering the focus of your school, articulate why charter schools are the model of choice for you to achieve and exceed your academic objectives. Your response should include (but not be limited to):
 - how converting will deliver positive impacts for students and the school community
 - how converting will enable you to innovate and/or improve performance and/or deliver education efficiently.

The Society of Holistic Learners (SOHL) Trust wishes to apply to the Authorisation Board of the Charter School Agency to convert Pakaraka School into a charter school under section 212 of the Education and Training Act 2024. The application is driven by the Board of Trustees of Pakaraka School with the overwhelming support of staff and the school parent community.

A similar application was previously submitted and approved by the Authorisation Board based on strong community demand for a Steiner pathway. 9(2)(ba)(ii)

the Pakaraka School Board and teaching staff elected to establish a brand-new legal entity, the Society of Holistic Learners (SOHL) Trust. This is to remove governance risk and carry the conversion forward directly. While the sponsoring entity name is new, it represents a direct continuity of the current Pakaraka School leadership, keeping the exact same trusted local personnel behind the governance, management, and educational delivery.

The Pakaraka School from 2019 to 2023 has experienced significant roll decline. That was turned around rapidly by 2025 due to the influx of Steiner interested parents, and welcomed by the existing school community. By the end of 2025 the roll was 59 and enrolments for the mid of 2026 are at 70 (making up 4 years of loss, 2019-2023, in 2.5 years). In part this has been due to the confidence that parents now have in the teaching and learning at Pakaraka School, they come from many places and include homeschooling parents who now see the local school as meeting the needs of their children. Furthermore, the already compounding success of the school with its known aspirations as a Charter School is proving successful in 2026 and parents are keen to get conversion underway.



Aspiration to convert to a charter school

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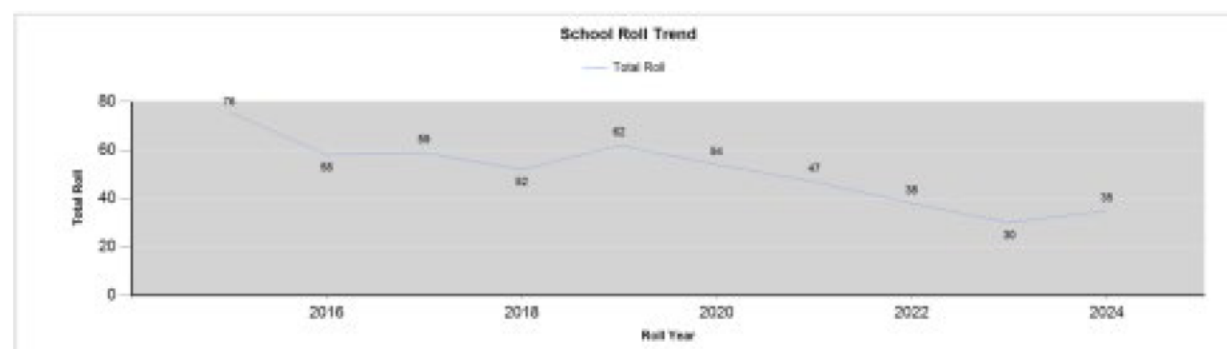


Figure 1: Ministry of Education Roll Trend Data

As a charter school Pakaraka School would continue to be the local school for the surrounding rural community. Although there is considerable choice within a 15-kilometre radius, we believe through the charter school model we will become the school of choice for local parents, as well as appealing to some from further afield.

SOHL trust will comply with Section 212 of the Education & Training Amendment Act by ensuring all students currently enrolled at Pakaraka School retain the right to be enrolled. SOHL trust is also determined that all local students should be able to attend the school if that is the wish of their parents.

By converting to a charter school SOHL trust estimates a consistent pipeline of 14 new enrolments each year at Pakaraka School in the period 2025-2027.

Converting to a charter school will enable a continued focus on quality teaching and learning based on Steiner Education philosophy. SOHL Trust is in discussions with Steiner Education Aotearoa New Zealand (SEANZ) regarding membership options appropriate for a charter framework. While we are not seeking an official 'Designated Character' status under this application, we will operate strictly using Steiner pedagogical principles, with the long-term intent of fully establishing the curriculum framework as the first Steiner-principled school pathway in Te Tai Tokerau.

'The College of Teachers' (see Governance Capability section), which consists of all teaching staff will be responsible internally for a more rigorous approach being taken to adhering to the pedagogy and by continuing with professional development based on the Steiner Education philosophy. As part of ensuring quality teaching, it is proposed that all teachers hold a Full Practising Teachers Certificate or are on the pathway as a Provisionally Registered Teacher (i.e. Beginning Teacher).

Converting to a charter school will also allow the teaching staff to be innovative in deploying the Steiner Education philosophy in Pakaraka. Teachers will be focussed on supporting students to become active agents in their learning, whilst the students will be encouraged in their provocations and grow towards self-directed learning. As part of the Steiner Education philosophy students will learn that relationships are reciprocal, responsive and respectful.

Both the local community and the school community will benefit from the decision to convert to a charter school. Already the school community has expressed a strong desire for Pakaraka School to become a



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charter school under the sponsorship of SOHL Trust. A parent survey completed in May 2026 showed 95.8% of respondents support the application by SOHL Trust to convert Pakaraka School from a state school to a charter school. Many of those parents surveyed commented on having seen the improvement in the quality of teaching and learning as the school has shifted its approach to be more supportive of Steiner Education philosophy. The conversion will allow us to complete that transformation.

The local community will benefit due to the provision of a viable quality provider – a school of choice. The roll decline in 2022-2023 when the roll dipped to 30 was a clarion call for change so that locals once again see Pakaraka School as a school of choice.

Background to the Steiner education in the community:

There has been a Steiner community in the rural surrounds of Pakaraka for more than two decades. This was realised in early childhood education with establishment of the Oromahoe Kindergarten in 2012. In 2024 Board of Trustees of Pakaraka School, entered a collaborative arrangement with the Oromahoe Kindergarten to use a surplus classroom for the purposes of a Steiner Education approach. The classroom was an immediate success with eight children enrolled at the beginning of the year, growing to 14 at the end of term four – this was out of a total school roll of 35. However, an accommodation by the school to remove devices from the classrooms in 2025 and continue music and kapa haka programmes satisfied Steiner and mainstreams cohorts. Some of the outcomes include continued roll growth, targeted professional development for teachers interested in Steiner Education, classrooms adopting more hands-on learning environment.

After deliberations and local consultation over a period of a year the Board of Trustees agreed that the best way forward was to apply to convert to a charter school. This consultation also considered including the option for secondary provision to ensure continuity in the Steiner Education philosophy. If established, it will be the first Steiner Education school in Te Tai Tokerau. The recent parent survey found 70% support for a secondary school pathway.

Vision - developing children into responsible citizens:

SOHL trust and the community wish to build a school where children fall in love with learning, grow into resilient and imaginative young adults, and leave equipped to make meaningful, compassionate contributions to their community and the world.

SOHL Trust will create a rich experience for the student that maintains the wonder of childhood, draws on the New Zealand's bi-cultural heritage, engages students in Northland's natural environment and prepares them to enter a complex and changing world. This approach balances solid focus on literacy and numeracy with a deep, experiential engagement with the arts, music, and practical skills like gardening and crafts.

Students will be engaged where they are developmentally, introducing subjects when their natural curiosity is ready to receive them, allowing for deeper comprehension and a lifelong love of learning. In doing this, teachers will instill students with emotional resilience, practical confidence, and establish an ability to think critically. The intention is to become a social hub for the community that actively fosters respect, mutual support and an inclusive culture that extends beyond the school gate. This includes



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engaging parents and whanau as lifelong learners themselves to better understand parenthood in the modern world.

Growth Path: From Primary to Composite School:

Short-term

SOHL Trust will look to boost enrolments and continue the drive to improve the standard of teaching based on the Steiner Education philosophy. Some limited gains have already been achieved, but for the gains to be sustainable the efforts must go further. This includes greater curriculum flexibility to offer what the local community wants and what they cannot access elsewhere.

SOHL Trust will maximise the existing 4-classroom footprint to accommodate Years 1–8. In 2023 there were two unused classrooms, one of which was converted to a Steiner classroom as part of the collaboration between Oromahoe Kindergarten and the Pakaraka School in 2024. In 2025 three classrooms were used although below capacity.

The plan for 2026–2028 is to optimise operations by running all 4 existing classrooms at a high-utilisation target of 80–90% of our primary-school capacity (targeting 25 students per class, and 14 in the new-entrants class, yielding a primary roll of ~89 against a maximum site capacity of 96). This efficiency ensures teachers only work across two-year levels per room while maximising resource allocation. SOHL Trust acknowledges the current low numbers of students in Years 7 & 8 and particular efforts will be made to retain and grow this student cohort on the basis of a secondary school development. Without the secondary school approval this will be an unlikely shift and will undermine timely growth.

Medium-term

The plan is to expand progressively to a composite Year 1–13 school starting with Years 9–10 in 2028. To accommodate this next phase, SOHL Trust will initiate a staged infrastructure plan to fundraise and build 3 additional classrooms over 5 years, meaning new builds are sequentially triggered by secondary enrolment thresholds and are not required on day one of the conversion.

The current site has capacity for this expansion and SOHL Trust will need to further engage with the school's community around the timing of the proposed expansion. There is also the option of entering into negotiations with the neighbouring farmer where the farm is for sale. Previously, the farmer had informally gifted a subdivided portion of land to the school although it appears that this offer was not taken up.

Long-term

As an alternative to adding farmland to the current site there is the possibility of the establishment of a satellite campus in Whangārei or one of the larger towns. Either through site expansion or a satellite campus enrolment could double in the decade 2030-2040 which would make secondary schooling provision more viable. This would be consistent with the growth in similar Steiner Schools nationally however it would be dependent on the aspirations of the community and potentially access to the neighbouring land being secured.



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SOHL Trust, through its vision, expects that greater investment in education facilities, stronger and wider networks will be formed to offer more quality education to all students and families alike. Those enrolments are from families who seek an alternative education not already on offer. Simultaneously it creates an opportunity for the Trust to develop a truly bi-cultural Steiner Education curriculum unique to place.



Sponsor capability

The requirements for this section are to demonstrate the sponsor's capability to support the operations, outcomes and performance of the charter school.

Experience and knowledge

1. Describe your experience and knowledge of the New Zealand schooling system and how this will enable you to effectively operate a charter school which will lift achievement and attendance for New Zealand students.

The SOHL Trust has extensive governance and management experience. As Sponsor SOHL trust envisages this experience and knowledge to help form a strong governance structure for the new school.

The Principal will be ex-officio and during the transition process will be responsible for ensuring the new school has a focus on quality teaching and learning.

SOHL Trust can confirm all trustees meet the criteria for assessing the proposed sponsor and governing members are fit and proper persons - refer Section 212J Education and Training Amendment Act 2024.

As an organisation the SOHL Trust has built up the organisation to ensure sustainability along the lines of the Steiner philosophy. This has ensured the parent community is fully involved in decision making and the education of their children.

In its Board Assurance Report of May 2024, the Education Review Office stated that the Pakaraka School Board successfully supported an environment which *provided learners with a strong sense of belonging, a positive school culture is fostered for all and staff who are committed to the tamariki and school.*

Subject to Authorisation Board approval to establish a charter school the SOHL Trust establish a subcommittee to oversee the transition from a state school to a charter school. The sub-committee will work closely with the Ministry of Education and its appointed Residual Manager regarding the closure of the state school. Throughout the transition process the school's community - students, whanau, staff and local community - will be kept fully informed of the process. In addition, the Sponsor will apply to the Charter School Agency for Support Partner funding to provide support through the transition process.

SOHL Trust Trustees are the current Pakaraka School Board of Trustees

- Rakesh Pinao - Pakaraka School Board Member and Presiding Member.
- Christiane Riegger - Pakaraka School Board Member, founder and previous Centre Manager of Oromahoe Kindergarten for 13 years. Early Childhood Teacher.
- Marcus Powell - Pakaraka School Board Member. Within Nature, Youth Education.
- Denise Anna - Pakaraka School Board Member. Within Nature, Holistic Health Practitioner.
- Fiona Murray - Pakaraka School Board Member. Lawyer. Music Teacher.

School Leadership & Teaching Staff:

- Patricia Simeon - Tumuaki | Principal
- Fiona McNab - Staff Representative, Senior Teacher recently Steiner trained (CRT Release)
- Larissa Bergman - Senior Teacher recently Steiner trained (Year 1)
- Bridie McCree - Beginning Teacher, developing outdoor classroom specialist (Year 2 & 3)
- Geraldine Pinao - Deputy Principal, Steiner teacher (Year 4,5,6)



Sponsor capability

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- Briar Gibson - Experienced Steiner teacher (Year 6,7,8)

Community Leaders:

- 9(2)(a), 9(2)(ba)(ii)

- 9(2)(a)
(2025).

Education Mentors:

- 9(2)(a)

Links with iwi

The Pakaraka School resides within the Ngati Kawa rohe which is centred on the Oromahoe Marae. The rohe is then part of the wider Ngati Hine iwi located in nearby Moerewa. Pakaraka School has had a long-standing relationship with Ngati Hine.

In recent years both the school has worked closely with Ngati Kawa to develop a relationship based on partnership. The school has also accessed support from Ngati Rehia to deliver kapa haka training.

The establishment of a charter school will provide an opportunity for greater engagement with iwi, which is something the newly appointed principal is keen to develop. There is also the opportunity as the school grows to develop a bi-cultural Steiner Education philosophy that meets the needs of local students.

Financial capability

2. Provide an indication of your financial viability through a profit/loss (P&L), cash flow and balance sheet for each year of your first three years of operation.

SOHL Trust is confident that Pakaraka School would be a viable entity as a charter school.

Pakaraka School Board created a detailed 10 Year PnL with annotations to consider a range of variables including costs associated with projected roll growth. Using the CSA funding calculator the Sponsor was able to calculate approximate income against expenditure over the 10 Year period to ensure longer term investment in the school facilities and curriculum and professional development was feasible. This included scenarios where minimal and higher enrolments were tested, additional classrooms facilities added, a school hall and outside facilities were also considered. Throughout the calculations the Trust has been careful to remain conservative when considering the likely roll.

In preparation for this application SOHL Trust have developed an appropriate P & L model for the converting school. 9(2)(ba)(ii)

This shows a capacity to allow for lighter enrolment growth or a period of stagnation as well as increased operating cost scenarios to be feasible realised with suitable management in place. However, this does not support the longer-term investment needs for secondary school and roll growth (see



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note on Existing Resource below). This requires additional classroom space to be leased or purchased. A purchase option is shown in the PnL Summary below.

Pakaraka School PnL Summary 2026-2029 v2.pdf

The draft Pakaraka School (10 year PnL) is provided below, and has been updated by MOE in May 2026, approved by the current Pakaraka School Board. Exiting resources including assets and property:

Financial Assets – The Board of Trustees and Sponsor are aware that Pakaraka School has operated with an increasing surplus over the period 2022-2025. The amount is likely to be in the vicinity of \$500,000 after current commitments. The actual level of surplus will need to be determined by the annual audited accounts. It is noted the 2024 accounts are yet to be audited. This is funding that should have been used for students attending Pakaraka School from the local community.

Property Assets – Two of the existing classrooms will be replaced, a new accessibility toilet (already designed) is expected to be completed, both were approved in the last property plan and have been updated. In addition, there are a series of electrical, heating, plumbing and drainage improvements, and agreement there is a need for a carpark and bus bay project. SOHL Trust believe these projects are ideal as a platform for the Charter School to take over and consider further growth developments.

3. Describe strategies to ensure long-term financial sustainability, including plans for financial oversight and accountability.

Financial oversight and accountability will be the responsibility of SOHL Trust, and other measures to ensure the financial sustainability will include:

- A targeted marketing campaign to ensure the projected roll growth is maintained across all the Year levels.
- Managed and agreed transfer of assets from Pakaraka School to the new school to minimise establishment costs
- Resourcing the school conservatively based on actual roll numbers from the outset. This will include minimising administrative support and maximising teaching support
- Establishing a contingency fund from the outset which will equate to three months operating expenses.
- Transition funds being used to ensure the buildings are fit for purpose:
 - Two 5 Year Property Plan commitments are incomplete from 2022-2023 – this will be negotiated between the transition committee and the Ministry.
 - Negotiating with the Ministry for the surplus funds held by the Pakaraka School Board of Trustees to be retained by the school. This would enable upgrading of the school car park (location at present is dangerous connecting SH 1 and SH 10), the upgrading of the school's playground including the swimming pool and the development and implementation of a landscaping and planting programme.
- SOHL Trust will also develop:
 - Annual Fundraising Plan



Sponsor capability

The requirements for this section are to demonstrate the sponsor's capability to support the operations, outcomes and performance of the charter school.

- In-kind donations from the community

Governance capability

4. Describe the governance structure for your school upon conversion. How will the structure support your workforce and operations to achieve excellent academic and attendance outcomes?

(refer also to the sections on Sponsor Capability)

The Pakaraka School will be governed by a Society of Holistic Learners (SOHL) Trust.

The overall governance and its relationship to management is described by three groups within the framework of the Steiner education philosophy:

[SOHL Trust Governance Model \(Draft v1\).pdf](#)

1. SOHL Trust (Legal, Financial and Strategic focus):

This is the legal and formal governance body. Its domain is the rights and ethics of the school.

- **Core Function:** The Board's function is to ensure the long-term viability of the school. This includes holding all legal and financial accountability, managing compliance with the legislation and regulations, and setting the overall strategic direction.
- **Composition:** The Board members are chosen by fellow society members by vote at each AGM. Their focus and experience is in governance, finance, law, and business. A representative from the College of Teachers and the Principal will be ex-officio members.

2. College of Teachers (Cultural and Pedagogical focus):

This is the professional and creative body of the school. Its domain is the "Cultural" aspect, and it is given significant autonomy over this area.

- **Core Function:** The College is responsible for everything related to education and pedagogy. This includes curriculum development, teacher training, student welfare, and upholding the school's philosophical identity.
- **Composition:** It consists of all the teaching staff and is led by the school Principal (or a designated Head of School).
- **Relationship to the Board:** The College reports regularly to the Board through the Principal to ensure transparency and accountability.

3. Parent Community (Community Economic focus):

This will be the community-facing body of the school, often operating through a committee. Its domain is the social relationships between the community and school.

- **Core Function:** This group is responsible for the community-facing aspects of the school. This includes fundraising, events, parent communications, outreach and fostering a strong sense of community.



Sponsor capability

The requirements for this section are to demonstrate the sponsor's capability to support the operations, outcomes and performance of the charter school.

- **Composition:** It is made up of parents, volunteers, and other community members.
- **Relationship to the Board:** The Parents Committee manages its delegated responsibilities and provides a direct, regular report to the Board. It is the Board that holds the final say on all financial commitments.



Performance Management Framework

The requirements for this section are to demonstrate how you will deliver outcomes against the Performance Management Framework.

1. What is your strategy to raise academic achievement and uplift student attendance? Using your current academic performance as a baseline, how will your transition to a charter school model preserve and enhance the performance of the school?

SOHL Trust recognises that increasing student engagement and raising student achievement are often inter-related challenges.

Student Achievement

Baseline data on student achievement has been undertaken in Term 1 of 2026 and will be made available as part of the reporting on the Charter School Performance Framework.

To achieve the predicted Performance Measure target for primary school achievement (Years 3-10) of 80% of all students at or above the curriculum level for their age in reading, writing and maths SOHL Trust through the school Principal will implement a range of strategies. These strategies include addressing matters raised in the ERO Board Assurance Report (May 2024) and include:

- Evaluating how effectively learning programmes, especially literacy programmes are supporting all learners to make accelerated progress and to achieve their potential
- Ensuring school wide achievement information is regularly collated, analysed and evaluated
- Supporting teachers to use appropriate assessment tools that are reliable and inform the next steps and learning
- Encouraging a culture of reading for enjoyment and information
- Providing professional learning that will support teachers to accelerate learning in literacy.

In 2025 the Board of Trustees at Pakaraka School has already taken steps to begin to address some of the matters raised by ERO. SOHL Trust as Sponsor will continue to oversee these improvements to support professional development programmes which target literacy and Assessment for Learning.

SOHL Trust is also committed to additional strategies which will seek to improve achievement.

Four key strategies:

- Consistent teaching capacity and capability - prioritisation to trained and qualified teachers with lower than-average teacher: student ratios.
- Quality teacher time - aiming to achieve no more than two year levels in each classroom to ensure each teacher has a smaller age range to cover
- Engaged learners - teachers will re-engage disengaged learners, utilising more experiential learning, the arts and music through the Steiner Education philosophy.
- With growth SOHL Trust will commit greater teaching resource to Te Reo Māori across the school and ensure Teo Ao Maori and Te Reo Maori are more consistently integrated into daily life of the school. Previously limited funding was made available to support Te Reo Maori. However, the proposed new approach goes hand-in-hand with a unique character and the focus on engaged learners and whanau.

Pakaraka School Attendance:



Performance Management Framework

The requirements for this section are to demonstrate how you will deliver outcomes against the Performance Management Framework.

The Performance Measure for Student Attendance is 80% of students having regular attendance. Both SOHL Trust and the current Board recognise student engagement and lateness are ongoing and unresolved issues for the school and its community.

Baseline data per term shows attendance levels in 2023 and 2024 was around 75-82%. In term 2, 2025 attendance was 77% and in term 3, 2025 it was 86%. In 2026, with a growing roll, attendance remained at or above 80% in Term 1. It should be noted that this is above the average for primary schools in the Northland region of similar EQI (source Education Counts).

With a Performance Measure of 80% SOHL Trust wants to foster an expectation of achieving 90% as charter school.

To achieve this aspirational teachers will need to continue to develop strategies which ERO identified as strengths:

- Learners have a strong sense of belonging.
- A positive school culture is fostered by all.
- Staff are committed to the tamariki of the school.
- Positive connections with whanau and the local community.

SOHL Trust also wants to pursue a range of strategies to further support engagement and attendance:

- One focus for the newly appointed Principal will be engagement with whanau and the community. This will be achieved by supporting the Principal so that she is “non-teaching”.
- Support services such as the Attendance Service (a non-cashed up resource) will be fully utilised.
- Implementing an Attendance Management Plan based on the Stepped Attendance Response.
 - This will include a community action plan i.e. talking with whanau and parents why attendance is so important.
- Students who need additional support will be targeted either through cashed up funding or through non cashed up resources such as the RTL service.

2. How will you ensure the standard of tuition will enable you to meet your contracted outcomes in the Performance Management Framework?



Performance Management Framework

The requirements for this section are to demonstrate how you will deliver outcomes against the Performance Management Framework.

(see also section 1 above)

The standard of tuition is a focus for SOHL Trust and the newly appointed Principal. The school is fortunate in having four fully trained and qualified teachers, as well as having access to specialist teachers e.g. music and fine arts.

Two of the teachers and the Principal are new to the school. SOHL Trust will support new staff including an induction to the Steiner Education philosophy. One beginning teacher completed her practicum at the school in 2025, and our new Principal are the only two to require formal Steiner training. The three remaining teachers were initially engaged when the Steiner unit was established in 2024 and have participated in ongoing professional development in Steiner Education philosophy.

The draft funding formula SOHL Trust has used makes sufficient provision of funding for four full time teachers and a non-teaching Principal. This will ensure that class size can be managed. It will also enable the Principal to ensure Year group levels are no more than 2 years e.g. Years 1-2, Years 3-4, Years 5-6 etc- traditionally the range of age groupings in classes has been a concern in small schools.

Example of a weekly timetable for Year 3-4:

Monday	Tuesday	Wednesday	Thursday	Friday	Approx time
Assembly	Circle Time				30-45 mins
Main Lesson (see note below)					1 hour-90 mins
MORNING TEA					20 min
Music	Music	Friends Circle	Handwork	Literacy	1 hour
Te Reo Māori	Maths/ Spelling	Kapa Haka	Form Drawing	Maths/ Spelling	1 hour
LUNCH					40 mins
Reading (Independent or small group reading)					30 minutes
Read aloud chapter book	Clay	Painting	Library	Whanau	30 minutes

Notes:

- Main lessons and practice lessons usually alternate. Main lessons are new topics taught in blocks of 2-4 weeks. Practice lessons are a revision of the topic(s) students have already learnt. Lessons typically complement each other in a day, Literacy for one then Maths for the other, but they could be in either order.



Performance Management Framework

The requirements for this section are to demonstrate how you will deliver outcomes against the Performance Management Framework.

- The before lunch block is 1.5 hours and so those sessions are either 60-30 or 45-45, or sometimes 30-60 depending on the context. Handwork is typically an hour, but if students are just finishing something it can reduce to 30 minutes. Friends Circle is 30-45 minutes.
- An overview of the curriculum Years 1-13 is available in the Student Assessment Strategy below and shown alongside the assessment tools.

As the roll increases funding will be targeted at ensuring moderate student-teacher ratios are maintained. The Steiner Education philosophy will also be beneficial:

- Steiner Education methods ensure every child is engaged and classroom learning is enhanced through outdoor and active learning opportunities.
- Overall, the Steiner Education philosophy involves a delay of formalised academics. This does not compromise learning, but is based on a understanding that this enhances long-term academic outcomes. It is a structured programme of learning based on sequential learning from strong foundations. The integration of arts, movement, and hands-on learning is acknowledged by independent research to boost creativity, wellbeing and academic achievement.
- While no directly comparative studies have been done, international and national Steiner schools show a boost in academic achievement above the average from Years 7 & 8.



Performance Management Framework

The requirements for this section are to demonstrate how you will deliver outcomes against the Performance Management Framework.

3. How will you measure this? What strategies will you apply to enable assessment, analysis and monitoring against each performance measure in the Performance Management Framework?

SOHL Trust is committed to carefully monitoring the new charter school against the Performance Measures. To achieve this SOHL Trust will use a number of monitoring and assessment tools which are noted below.

Monitoring and assessment tools:

Pakaraka School will continue to use Progress and Achievement Testing, however the Sponsor and the new Principal will take cognisance of Ministry of Education assessment strategies which suggest new and more appropriate assessment tools may be available later in 2026.

Pakaraka School will move to a recognised SMS system to record student achievement and attendance. This will also enable the Charter School Agency to draw down data.

SOHL Trust will work with the Education Review Office to undertake the initial review prior to opening and then any subsequent review.

SOHL Trust will undertake its own self review/audit process in the years ERO is not evaluating the school.

The SOHL Trust and the school's Principal will ensure that policies and procedures are updated to ensure statutory compliance.

The Board of SOHL Trust will receive regular reports from the Principal on achievement and attendance. The reports will include plans to address any shortfall in attaining Performance Measures.

Pakaraka School will implement the Student Assessment Strategy which has been prepared to outline how assessment evolves from kindergarten to high school under the Steiner Education Philosophy.

[Pakaraka Charter School - Student Assessment Strategy \(Proposed v2\).pdf](#)

The strategy notes:

Teacher observations against curriculum expectations are the primary tool once children begin Class 1 (the year they turn 7). This is reported on at the beginning and end of each year, and feeds into lesson planning for each child and in discussions with families.

Formative assessments such as running records and phonetic assessments are introduced first, followed by PAT assessments. This move towards standardised testing over time and is developmentally appropriate and does not impact on child learning. Teachers will continue observations as a powerful tool of supporting the teacher to address student needs across learning areas.

The Sponsor anticipates the agency will understand that lower average results in early years are to be expected when the Steiner Education philosophy is implemented, but the benefit comes from higher child engagement and higher average academic achievement by Years 7 and 8.



Performance Management Framework

The requirements for this section are to demonstrate how you will deliver outcomes against the Performance Management Framework.

Monitoring progress is of high importance to SOHL Trust and the teachers of Pakaraka School, because such tests help demonstrate the success of the Steiner Education philosophy.



Level of support

The requirements for this section are to demonstrate your understanding of the level of support that exists for you the sponsor and for your school becoming a charter school.

1. Demonstrate the level of support for the proposed conversion to being a charter school, and for the proposed sponsor, from the school community.
 - a. Identify the stakeholders who have been consulted and what the consultation was
 - b. Describe the community consultation activities that have occurred or are planned
 - c. Describe how this has informed your decisions about your charter school, identifying where there is risk and where there is support for the conversion of your school.

In Section A the Sponsor outlined the journey SOHL Trust and the Board of Trustees of Pakaraka School have engaged in since 2023. This has culminated in this application to establish a charter school based on the Steiner Education philosophy.

SOHL Trust has received explicit support from the school parent community, from community members outside of parents, and from existing staff. Parent survey in May showed overwhelming support.

In term 4 2025 two meetings were held with staff and further meeting with staff in early 2026 to design the Sponsor as a new legal entity.



Assurance activities

As a converting school, you will have started preparation activities throughout the application period such as staffing consultation, transition preparation, negotiating your property lease and preparing your community for the conversion.

We've been keeping in contact with you throughout the application period about these activities but if you are not sure if you have covered everything, head to our website to access further information and resources.

Assurance activities check

This is a prompt for you to confirm that you are underway with each of these activities and are aware of your responsibilities in conducting them, and to note any important information regarding your progress. This helps to provide assurance to the Authorisation Board that you are undertaking these activities which are key establishment requirements.

Staffing consultation The outgoing state school board has consulted with staff about the proposed conversion.	☒ <i>Check 'yes' or leave blank if 'no'</i>	Comments The previous Board met with staff in August 2025, and the incoming Board have since met with staff in March 2026. Staff supported the proposed application.
Transition preparation The outgoing state school board and the incoming sponsor are underway with the duties required to prepare for the change in governance.	☒ <i>Check 'yes' or leave blank if 'no'</i>	Comments SOHL Trust is formed from the Pakaraka School Board of Trustees. SOHL Trust will work closely with the Ministry of Education's Residual Manager to ensure property matters are addressed along with any other transition matters.
Lease negotiation The sponsor and the Ministry of Education are underway with agreeing the terms of the lease and the ongoing management of assets.	☒ <i>Check 'yes' or leave blank if 'no'</i>	Comments SOHL Trust will enter into negotiations with the Ministry regarding a 10 + 10 year lease of the Pakaraka School site or such a term as meets the requirements of the Authorisation Board
Community consultation The sponsor and the school have consulted with the community to determine the level of support for the sponsor and for the proposed conversion.	☒ <i>Check 'yes' or leave blank if 'no'</i>	Comments See comments above about consultation and the school parent survey.



Comments on draft agreement

Applicants wishing to propose any amendment to the Specific Terms of the Agreement for consideration must do so as part of this application.

None



Application declaration

Complete and sign the application declaration below to complete your application document.

Topic	Declaration	Applicant's declaration
Application Process, Terms and Conditions:	I/we have read and fully understand this Application, including the Process, Terms and Conditions. I/we confirm that the Applicant/s agree to be bound by them.	Agree
Collection of further information:	The Applicant/s authorises the Charter School Agency and the Ministry of Education to: - collect any information about the Sponsor, except commercially sensitive pricing information, from any relevant third party, including a referee. - use such information in the assessment of this Application. The Applicant /s agrees that all such information will be confidential to the Charter School Agency and the Ministry of Education.	Agree
Use of Information:	The Applicant/s agree that information provided as a part of the fit and proper persons test can be shared with appropriate third parties engaged to undertake the necessary reviews.	Agree
Draft Agreement:	The Applicant/s accepts the General Terms and Legal Schedules of the Agreement and confirms that they have prepared their application on the basis that no amendments to the General Terms and Legal Schedules will be considered.	Agree
Conflict of Interest declaration:	The Applicant warrants that it has no actual, potential or perceived Conflict of Interest in submitting this Application or entering into a Contract to deliver the Requirements. Where a Conflict of Interest arises during the Application process the Applicant /s will report it immediately to the Charter School Agency and the Application Point of Contact.	Agree
Conflict of Interest detail:	None	
Sponsor signature		



Application declaration

Complete and sign the application declaration below to complete your application document.

Signature:	
Full name:	Rakesh Pinao
Title / position:	Chairperson
Name of organisation:	Society of Holistic Learners
Date:	15/06/2026