



*Āhuatanga Katorika
Kaupapa Arotake
Me Te Ahu
Whakamua*

*Catholic Special
Character Review for
Development*

Aotearoa New Zealand Catholic Integrated Schools

Draft as at 27 November | 2018 Edition

(Includes amendments in line with the Education and
Training Act 2020)

New Zealand Catholic Education Office Limited



per the cover page artwork

Kōwhaiwhai (curvilinear surface design) is the ancient art of painted traditions by Māori. As an art form kōwhaiwhai is distinctively Māori, most often seen on the meeting house ridgepole (tāhūhū) and on the rafters (heke).

Kōwhaiwhai patterns show an emphasis on the use of forms that represent growth, the uncurling of the young fern frond, young curled leaves, shoots and branches.

This pattern on this document signifies the unbroken life line in white which results in the family (whānau), mother (māmā) and father (pāpā) cradling their children (tamariki) and grandchildren (mokopuna). The red represents mother earth (Papatūānuku) while the black represents the sky father (Ranginui).

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Āhuetanga Katorika Kaupapa Arotake Me Te Ahu Whakamua
Catholic Special Character Review for Development

Developed by the New Zealand Catholic Education Office

The New Zealand Catholic Education Office is the office of the New Zealand Council of Proprietors of Catholic Integrated Schools. It also serves the educational requirements of the New Zealand Catholic Bishops Conference. It assists the Conference and the proprietors of Catholic Integrated schools in their mission of providing Catholic education.

in partnership with

The New Zealand Catholic Bishops Conference

The New Zealand Catholic Bishops Conference (NZCBC) is the national body for the bishops of Aotearoa New Zealand. The Conference has a Secretariat located in Wellington, and a number of agencies and offices to assist the bishops in carrying out national level functions.

CONTENTS

HE KUPU WHAKATAKI - FOREWORD.....	1
NGĀ WHĀINGA O TE AROTAKE - AIMS OF THE EXTERNAL REVIEW	2
INTERNAL EVALUATION OF CATHOLIC CHARACTER	3
THE STEPS IN THE EXTERNAL REVIEW.....	4
SUMMARY: THE FOUR DIMENSIONS OF THE REVIEW, AND THE FOCUS AREAS.....	5
THE FOUR DIMENSIONS OF THE REVIEW, THE FOCUS AREAS, AND ITEMS FOR THE SCHOOL AND THE REVIEWERS TO CONSIDER.....	7
DIMENSION 1: TE TŪTAKI KI A TE KARAITI ENCOUNTER WITH CHRIST	7
1. Spiritual Formation	7
2. Evangelisation	8
3. Faith-based Leadership.....	9
DIMENSION 2: TE WHAKATUPU MĀ TE MĀTAURANGA GROWTH IN KNOWLEDGE	10
1. Leadership.....	10
2. Religious Education.....	10
3. Catholic Curriculum.....	12
DIMENSION 3: TE WHAKAATU KARAITIANA CHRISTIAN WITNESS	14
1. Catholic School Community	14
2. Partnership and Collaboration.....	15
3. Te Tiriti o Waitangi.....	15
DIMENSION 4: TE KAITIAKITANGA ME TE WHAKAPAKARI I TE TUAKIRI KATORIKA SAFEGUARDING AND STRENGTHENING CATHOLIC CHARACTER.....	18
1. Stewardship	18
2. Legal Obligations.....	20
APPENDIX 1: NGĀ HERENGA TURE – LEGAL OBLIGATIONS	21
APPENDIX 2: NEW ZEALAND LEGISLATION SPECIAL CHARACTER OBLIGATIONS REQUIRED OF BOARDS OF TRUSTEES OF CATHOLIC INTEGRATED SCHOOLS.....	21
APPENDIX 3: AREAS OF RESPONSIBILITY FOR CATHOLIC SPECIAL CHARACTER REVIEW FOR DEVELOPMENT.....	37
APPENDIX 4: DOCUMENTS GOVERNING THE WORK OF REVIEWERS.....	41
APPENDIX 5: GLOSSARY	46

HE KUPU WHAKATAKI - FOREWORD

This revised document has been developed by a writing group over six years. Very grateful thanks go to Linda McQuade, Vicar for Education, Auckland Diocese, Colleen Gleeson, Review and Development Advisor, Auckland Diocese, Lynette Roberts-King, Manager, Catholic Education Office, Palmerston North Diocese, Rosalie Connors, Review and Development Advisor, Palmerston North Diocese. They have given generously and endlessly of their time and expertise in developing this revised document.

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Susan Apáthy

Deputy CEO

New Zealand Catholic Education Office

NGĀ WHĀINGA O TE AROTAKE - AIMS OF THE EXTERNAL REVIEW

The Catholic School reminds us that Catholic school education provides “a synthesis of culture and faith and a synthesis of faith and life.”¹

The Catholic School on the Threshold of the Third Millennium states that “The Catholic school participates in the evangelising mission of the Church.”²

The NZCBC wishes the review to show how effective the school is in handing on the faith and forming a new generation of Catholics; this includes evaluating the efficacy of Religious Education and how the whole school community engages in authentic Catholic Christian witness and evangelisation. This is the evangelising mission of the Church, in which the school participates. In *The Catholic Education of School-Age Children* (2014) the Bishops stated:

“The Catholic Character review process examines what a school does to maintain its Catholic Character. The process needs to consider the lives of the students if it is to produce a focused picture of the impact of Catholic schooling on the students concerned. An incisive Catholic Character review will seek to determine whether the students have ‘encountered the living God’, grown in knowledge, and as a result, have formed a deep and lasting relationship with Christ and his Church.”³

“Catholic education is above all a question of communicating Christ, of helping to form Christ in the lives of others.”⁴

“First and foremost every Catholic educational institution is a place to encounter the living God who in Jesus Christ reveals his transforming love and truth.”⁵

“Facilitating... a genuine and ongoing encounter with Christ... is an essential function of the Catholic school... This progression from encounter, to growth in knowledge and to Christian witness is the framework of the disciple’s journey.”⁶

In the review, schools are asked to consider and demonstrate the ways in which they provide for their students:

- ❖ an encounter with Christ,
- ❖ growth in knowledge, and
- ❖ the development of Christian witness.

The review also investigates stewardship, including stewardship of the relationship between the Church and the State.

The review is designed to look at the work the school has done, in its internal evaluation and development, to grow Catholic Character. It affirms what the school has done and the opportunities for further development the school has discerned. It challenges the school to be more transformational. Reviewers encourage and commend best practice, and work with the school to analyse opportunities to further strengthen and develop the Catholic culture.

¹ Sacred Congregation for Catholic Education, Rome 1977, para 37

² Congregation for Catholic Education 1997, para 11

³ *The Catholic Education of School-Age Children*, 2014, New Zealand Catholic Bishops Conference. (para 29)

⁴ Blessed Pope John Paul II, Message to the Catholic Educational Association of the United States, 1979, quoted in *The Catholic Education of School-Age Children*, 2014, New Zealand Catholic Bishops Conference.

⁵ Pope Benedict XVI, Address to Catholic Educators of the United States, 2008, quoted in *The Catholic Education of School-Age Children*, 2014, New Zealand Catholic Bishops Conference.

⁶ *The Catholic Education of School-Age Children*, 2014, New Zealand Catholic Bishops Conference. (paras 13 and 14)

INTERNAL EVALUATION OF CATHOLIC CHARACTER

Internal evaluation should occur annually in each school, in Catholic Character as in other aspects of school life. A timetable of planned internal evaluation is included in the school’s strategic and annual planning.

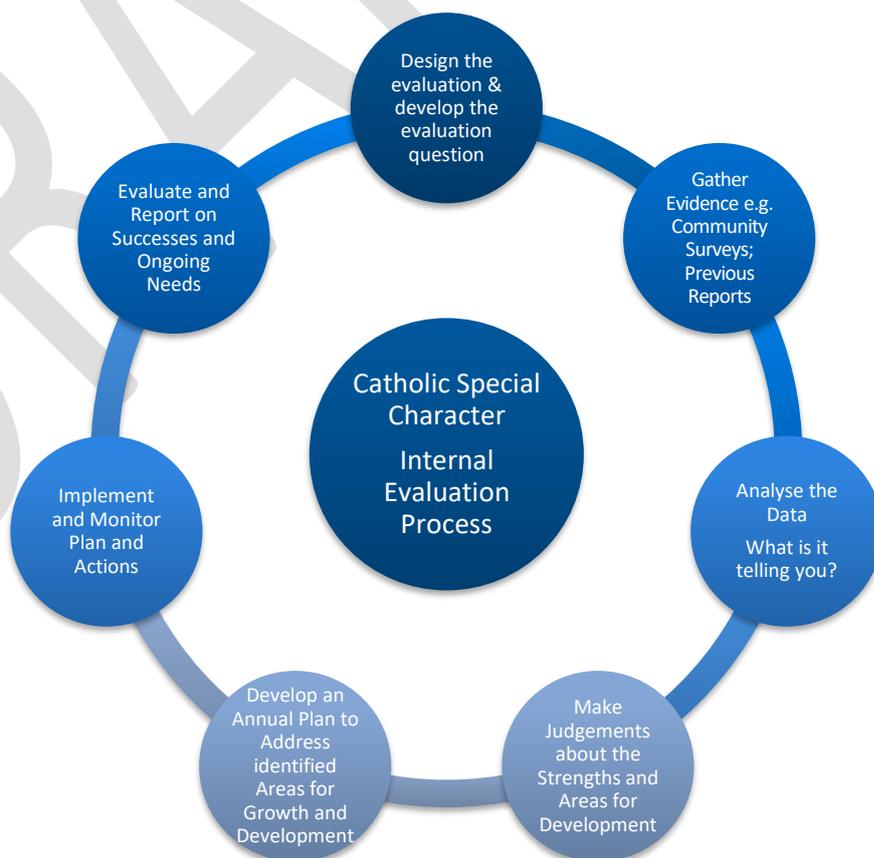
The planning should show the question the school is asking, the data to be collected, and who is responsible, how the information is to be shared and the process for formulating possible actions. It is recommended that schools develop a template for internal evaluation so that evaluations are consistent over time.

Internal evaluation develops a question arising from one of the dimensions of the review document i.e. Encounter with Christ, Growth in Knowledge, Christian Witness, or Safeguarding and Strengthening Catholic Character. The dimensions are to be covered over a cycle of three years. (The fourth dimension, Stewardship, includes checking and revising policies and refreshing documentation. It should be undertaken annually.)⁷ After choosing the dimension the school considers: How well do we manage this aspect of Catholic Character? What should we continue to do? What should we stop doing? What should we start to do? The school community, Board, staff, ākonga (students), family/whānau and parish community can be questioned and data gathered so as to form a conclusion and enable the framing of next steps. These will go into the Strategic and Annual Plan for action, and will be reviewed in due course.

In addition to a planned internal evaluation, schools can also use the internal evaluation template to undertake an evaluation of an emerging issue of Catholic Character if one arises, so as to be able to quickly respond from an informed point of view.

Internal evaluation should be manageable. A focussed small question is more likely to produce useful outcomes in the school than a global study.

Those that have participated in the questioning stage should be informed of the outcome of the review – if people contribute they need to know they have been heard, and to know what changes are planned.



⁷ The Board also provides an annual attestation to the Proprietor, which concerns the school’s legal obligations.

THE STEPS IN THE EXTERNAL REVIEW

1. The diocesan office sends the school notice of the upcoming review.
2. The school prepares: it considers progress on the steps for development provided in the last external review, the goals and achievements arising from recent annual internal evaluations of Catholic Character, and the Catholic Character goals in the school Charter. The school uses the review document to focus its thinking. The school considers what it hopes to work on next, i.e. the steps it will agree with the reviewer. The more the school has prepared for the review the more positive the review process is likely to be.
3. The school is provided with a list of documentation that will be required in advance of the review. This documentation enables the reviewer to become familiar with the school, and saves time during the review.
4. The school provides the documentation to the reviewer.
5. The review occurs. It is essentially a co-operative process between the school and the reviewer, with the reviewer as a critical friend, to help the school see what it is doing well, what it can improve and where it will go next. The reviewer asks questions arising from the dimensions and the focus areas. The school may indicate what it considers is most important in this particular review.
6. A draft copy of the review is sent to the Board.
7. The final review is provided to the Board, the Proprietor, the Bishop of the diocese (if he is not the Proprietor) and NZCEO.
8. The Board ensures that review recommendations for development are placed in the school's annual plan, and that progress is monitored.
9. The diocesan Catholic Education Office provides follow up assistance and/or PLD (Professional Learning and Development) as requested.

SUMMARY: THE FOUR DIMENSIONS OF THE REVIEW, AND THE FOCUS AREAS

DIMENSION 1: TE TŪTAKI KI A TE KARAITI | ENCOUNTER WITH CHRIST

How effectively does the school encourage and facilitate the development of a personal relationship with Jesus Christ who reveals the transforming love and truth of the living God?

FOCUS AREAS:

1. Spiritual Formation

How effectively does the school provide ongoing Catholic spiritual formation to assist individuals to deepen their personal relationship with Christ?

2. Evangelisation

How effectively does the school, through its practices and communications, facilitate an encounter with Christ and spread the Good News to both churched and unchurched members of the community?

3. Faith-based Leadership

How effectively does faith-based leadership effectively shape the school's vision and direction, so as to ensure a genuine and ongoing encounter with Christ?

DIMENSION 2: TE WHAKATUPU MĀ TE MĀTAURANGA | GROWTH IN KNOWLEDGE

How effectively does the school assist its community to grow in the knowledge and understanding of Jesus Christ, his teachings and the Catholic Church?

FOCUS AREAS:

1. Leadership

How does effective leadership enable growth in knowledge and understanding, which are necessary factors in the disciple's journey?

2. Religious Education

How effectively is the Religious Education programme given high status, and what evidence is there that it is soundly managed, appropriately resourced, and professionally delivered by qualified kaiako (teachers)?

3. Catholic Curriculum

How effectively is the Catholic worldview integrated into the daily practices of the school and into all curriculum areas?

DIMENSION 3: TE WHAKAATU KARAITIANA | CHRISTIAN WITNESS

How effectively does the school provide a hope-filled Christian witness which empowers its community members to integrate their faith and their life?

FOCUS AREAS:

1. Catholic School Community

How effectively does the school, as an authentic Catholic community, promote and support active Catholic witness and practice in the school and in the parish community of which it is an integral part?⁸

2. Partnership and Collaboration

Recognising that education is a collaborative responsibility, how effectively does the school build strong commitments to all the groups it relates to including its whānau, its parish(es)/Māori Eucharistic communities, its founding religious congregation, its Proprietor and its Bishop? How do ākonga (students) develop an understanding of, and respect for, the cultural diversity of New Zealand?

3. Te Tiriti o Waitangi

How effectively does the school, as an authentic Catholic community, demonstrate a strong commitment to the principles of Te Tiriti o Waitangi/The Treaty of Waitangi, reflecting the commitment of the Aotearoa New Zealand Catholic Church to bicultural partnership?

4. Pastoral Care

How effectively does the school ensure that education occurs in a safe, nurturing environment supported by a strong pastoral care network in which each member of the community is known, respected, cared for and aware that they are loved unconditionally by God?

5. Service and Outreach

Recognising that each person is called as a Christian to take care of others and to work for justice and equality, in what ways does the school explicitly base service and outreach activities in the Gospel message, and grow the practice and understanding of caring for others?

DIMENSION 4: TE KAITIAKITANGA ME TE WHAKAPAKARI I TE TUAKIRI KATORIKA | SAFEGUARDING AND STRENGTHENING CATHOLIC CHARACTER

How effectively does the school, in its stewardship, and its compliance with legal obligations, safeguard and strengthen its Catholic identity?

FOCUS AREAS:

1. Stewardship

How effectively does Governance and management safeguard and strengthen Catholic Character within the areas of Organisation, Employment, Professional Development and Enrolment?

2. Legal Obligations – as listed later in this document.

⁸ The school is one with the faith community of its parish or parishes. "It is an arm of the parish or group of parishes." (*Catholic Education of School-Age Children*, para 76). Ongoing collaboration with the parish is highly important.

THE FOUR DIMENSIONS OF THE REVIEW, THE FOCUS AREAS, AND ITEMS FOR THE SCHOOL AND THE REVIEWERS TO CONSIDER

This detailed section provides items under each focus area to help the school in discerning its internal evaluation questions. Reviewers will consider the items to assist them in looking for evidence in relation to each dimension and focus area, and forming judgements. The items are not a checklist, nor do they exclude other possibilities, but they indicate actions, knowledge or behaviours that might be evident in the school to support a judgement made by the school or the reviewer about the focus areas and the dimensions.

DIMENSION 1: TE TŪTAKI KI A TE KARAITI | ENCOUNTER WITH CHRIST

How effectively does the school encourage and facilitate the development of a personal relationship with Jesus Christ who reveals the transforming love and truth of the living God?

FOCUS AREAS:

1. Spiritual Formation

How effectively does the school provide ongoing Catholic spiritual formation to assist individuals to deepen their personal relationship with Christ?

1. There is a shared understanding and long-term vision in the school of what Catholic spirituality is.
2. Opportunities are available for the spiritual development of all members of the school community (including whānau, BOT, non-teaching staff as well as ākonga and kaiako).
3. Varied and rich prayer is an integral part of the daily routine of school life. This includes individual and community prayer using traditional and contemporary forms.
4. There is space and time for quiet personal reflection and prayer.
5. There are rich retreat opportunities for ākonga, kaiako and other staff and the Board of Trustees, which focus on encountering Christ on the journey of discipleship.
6. Ākonga are able to articulate a spiritual, Gospel-based response to major life questions, including individual, social and global issues.⁹
7. Gospel values, clearly sourced from a Gospel story or parable, are taught, modelled and promoted. Students learn how to critique ethical issues from a Catholic perspective.
8. The theological and cardinal virtues are known, understood and lived.¹⁰

⁶ Useful background information is at: www.ncrs.org.nz, www.nathaniel.org.nz, and www.caritas.org.nz/catholic-social-teaching

¹⁰ The **Three Theological Virtues** (which enable human beings to participate in the divine nature) are Faith, Hope, Charity. The **Four Cardinal Virtues** (i.e. the pivotal human virtues) are Prudence (wisdom), justice, fortitude (courage) and temperance (self control).

9. Ākonga will have the opportunity to encounter Christ through Māori wairua/ spirituality and through the lens of their individual culture, whatever that is.
10. Ākonga's knowledge of, and encounter with, Jesus Christ is based in the Gospels, the Epistles and the Acts of the Apostles.
11. The school has ways to assess the impact it has on the growth in faith of ākonga.

2. Evangelisation

How effectively does the school, through its practices and communications, facilitate encounter with Christ and spread the Good News to both church and unchurched members of the community?

1. The school proclaims the mission and Gospel of Jesus Christ to all members of the school community.
2. The school provides a variety of opportunities for members of its community to develop and deepen their knowledge and understanding of the scriptures and teaching of the Catholic Church.
3. The school analyses data on preference certificates to enable it to work proactively with ākonga, whānau and their parish(es), so that students can begin and continue their sacramental and faith journey.
4. Whānau are actively engaged in the faith journey of their children and the school has specific information, programmes or activities to encourage this.
5. Primary schools actively support and promote parish programmes for the Sacraments of Initiation, and programmes that support children's faith in the years beyond the Sacraments of Initiation.
6. Secondary schools actively encourage participation in appropriate programmes for teenagers that lead to the Sacraments of Initiation, and work to instigate or promote programmes that support teenagers' faith in the years beyond the Sacraments of Initiation.
7. The school actively encourages attendance at Sunday Mass, and the reception of the Sacraments.
8. School induction and orientation programmes assist new members of the community (including ākonga, whānau, BOT, non-teaching staff and kaiako) to deepen their understanding of what it means to be part of a Catholic community.
9. There is a regular programme of liturgies and Masses that are appropriate for the age and culture of participants, and students have the opportunity to develop these liturgies or to have some leadership roles in them.
10. All staff are positive role models who support, uphold and witness to the Catholic Character of the school.
11. School communications, including the website and other social media, are used as a means of evangelisation, helping members of the school community to integrate their faith, culture and life.

3. Faith-based Leadership

How effectively does faith-based leadership effectively shape the school's vision and direction, so as to ensure genuine and ongoing encounter with Christ?

1. The principal and DRS confidently and competently articulate their own faith and are committed to their own ongoing faith formation.
2. The principal and DRS are working to advance their certification and qualification levels.
3. The principal encourages, empowers and nurtures faith in others and encourages faith-based leadership from all.
4. The principal, supported by the senior leadership team, articulates and promotes a faith-based vision for the school.
5. The principal and the DRS work collaboratively to lead the development of Catholic Special Character.
6. The principal, DRS, chaplain and/or campus minister provide effective leadership for the development and implementation of activities and programmes that help people to encounter Jesus Christ.
7. In secondary schools, every effort is made to ensure there is a chaplain and/or campus minister, who collaborates with the Principal and DRS in their roles.
8. All kaiako in Schedule 6: Clause 47: Education and Training Act 2020, special character positions (previously S464 positions) understand and accept the significant role they play in the evangelisation of ākonga. This work is a ministry within the Church.¹¹
9. The principal and DRS ensure that opportunities are provided for teachers in special character Cl 47 positions and other Catholic teachers to deepen their faith and understanding of the teachings of the Catholic Church.¹²
10. Board policy and plans support the expectation of the NZCBC that the principal and teachers of Religious Education are working towards a formal qualification in Religious Education or Special Character and that all kaiako are working towards the next level of certification.

¹¹ See *Employment Fact Sheet: Information and Notes Related to Special Character Position Forms* in Employment Section of the *Handbook for Boards for Trustees of New Zealand Catholic Integrated Schools* <https://www.nzceohandbook.org.nz/employment/#resources>

¹² Primary schools see *Special Character Fact Sheet: Professional Development and Spiritual Formation for Teachers* in Special Character Section of the *Handbook for Boards of Trustees of New Zealand Catholic Integrated Schools* <https://www.nzceohandbook.org.nz/special-character/>

DIMENSION 2: TE WHAKATUPU MĀ TE MĀTAURANGA | GROWTH IN KNOWLEDGE

How effectively does the school assist its community to grow in the knowledge and understanding of Jesus Christ, his teachings and the Catholic Church?

FOCUS AREAS:

1. Leadership

How does effective leadership enable growth in knowledge and understanding, which are necessary factors in the disciple's journey?

1. The DRS, and HOD RE if applicable, is a faith-filled, positive role model.
2. The principal and DRS provide effective leadership in religious instruction¹³ and observances.
3. The DRS is appropriately qualified, certificated, and provides effective leadership for the delivery of the Religious Education curriculum.
4. The principal and DRS collaborate to ensure teacher development in Religious Education and Catholic Special Character.
5. The role of the DRS is given appropriate status in terms of such things as being a member of the senior leadership team, having appropriate release time, appropriate management units, and having opportunities for their leadership capability to be developed.
6. The DRS, in their management role, is involved in Religious Education and Catholic Character financial planning, the allocation of staff to the teaching of Religious Education classes, and the appointment of teachers of Religious Education.
7. The DRS and the principal monitor the work of, and provide ongoing professional support for, teachers of Religious Education.
8. The school leadership engages in discussion and planning on how to synthesise a future-focused culture, faith and life, in the work of the school.

2. Religious Education

How effectively is the Religious Education programme given high status, and what evidence is there that it is soundly managed, appropriately resourced, and professionally delivered by qualified teachers?

¹³ The term religious instruction is defined in *Employment Fact Sheet: The Purpose of Schedule 6: CI 47 Special Character (Tagged) Positions* in the Employment Section of the *Handbook for Boards of Trustees of New Zealand Catholic Integrated Schools* <https://www.nzceohandbook.org.nz/employment/>

1. The school implements the nationally mandated Religious Education curriculum delivering its Achievement Objectives with integrity, for no less than the minimum time each week specified by the New Zealand Bishops.¹⁴
2. The school provides effective learning and teaching programmes for Religious Education, and is adequately and appropriately resourced to deliver these programmes.
3. Teaching and learning in Religious Education reflect best practice in current pedagogy.
4. Planning, assessment, evaluation and reporting procedures are at least as effective and professional as those in other learning areas, being based on high quality, valid data about ākonga learning and achievement.
5. Kaiako use appropriate assessment data and work collaboratively together to understand their impact on student achievement in RE.
6. Kaiako make effective use of NCRS online curriculum material including Faith Alive (primary) and Faith Central (secondary).
7. RE teaching is effective, creative, and engages ākonga; kaiako implement strategies to meet the individual learning needs of ākonga, including ESOL students. Such strategies are underpinned by quality evidence of effectiveness.
8. Specialised Religious Education induction programmes are provided for ākonga who are new to Catholic schooling and/or the New Zealand Catholic education system, and who have no or little understanding of the Catholic Church, its beliefs and its practices.
9. International students attend Religious Education classes, which are adapted appropriately for their needs.
10. The Religious Education programme is taught in a way that enables ākonga to integrate their faith and their life.
11. Ākonga progress reports inform whānau of achievement in both Catholic Character (religious or spiritual development) and Religious Education curriculum.
12. Teachers of Religious Education are qualified in Religious Education and have certification levels appropriate to their length of service in Catholic education.
13. Religious Education teachers participate in regular Catholic Character professional development which is recorded for certification and appraisal purposes. They also

¹⁴ See *Special Character Fact Sheet: Time allocation for Religious Education* in the Special Character Section of the *Handbook for Boards of Trustees of New Zealand Catholic Integrated Schools* <https://www.nzceohandbook.org.nz/special-character/>

engage in professional dialogue on the theological, scriptural and Church teachings for each Religious Education topic or strand.

14. Religious Education teachers understand their role as catechist as well as educator.
15. The school makes use of Catholic Education advisory services.
16. Whānau are informed regularly of the content and emphasis of the Religious Education programme. (Depending on school practice this might be weekly, monthly or termly.)
17. The primary school promotes and makes available the family/whānau programme, to assist family/whānau to support the religious development of their children.

3. Catholic Curriculum

How effectively is the Catholic worldview integrated into the daily practices of the school and into all curriculum areas?

- 1 All staff members engage in a regular, planned programme of Catholic Character professional learning and development, including PLD on the principles of Catholic social teaching,¹⁵ and their application to their responsibilities.
- 2 The school teaches the core principles of Catholic social teaching and their application, as an integral component of a lived faith.
- 3 The school contributes to awareness raising and action for justice within the school and in the wider community, explicitly relating this to the Gospels' portrayal of Jesus' care for the poor and marginalised, which is central to the Gospel message.
- 4 The school develops students' ability to critique society in the light of the Gospels (e.g. through Caritas involvement, and the use of Caritas educational material).
- 5 The school develops students' awareness of their responsibilities as global citizens as well as citizens of New Zealand.
- 6 The school has a requirement that a Catholic perspective is included in all curriculum areas, and systems are in place to support and monitor this.
- 7 School policy ensures that those aspects of the Health curriculum which involve human sexuality education are set in the context of the teaching of the Catholic Church, and that whānau and the Proprietor are consulted about the programme.
- 8 Kaiako involved in teaching the Human Sexuality and Personal Development components of the Health curriculum have participated in professional learning and development approved by the Proprietor/Bishop.

¹⁵ "The permanent principles of the Church's social doctrine constitute the very heart of Catholic social teaching. These are the principles of: the dignity of the human person, ... which is the foundation of all other principles and content of the Church's social doctrine; the common good; subsidiarity; and solidarity." *The Compendium of Social Doctrine of the Church #160*, Pontifical Council for Justice and Peace: St Paul's Publications 2004.

- 9 The school has a system for ensuring that all resources, including e-resources, which are used in the teaching and learning programme for RE, and in other areas as appropriate (e.g. Health, Social Sciences, Science) are in line with the key teachings of the Catholic Church.
- 10 Kaiako new to Catholic schools receive ongoing support to enable them to understand the Catholic culture of the school and to effectively integrate a Catholic perspective across the curriculum.
- 11 Academic achievement and depth of learning are promoted in all curriculum areas.
- 12 Opportunities are available to all ākonga to achieve their individual best in all areas of the life of the school.

DRAFT

DIMENSION 3: TE WHAKAATU KARAITIANA | CHRISTIAN WITNESS

How effectively does the school provide a hope-filled Catholic Christian witness which empowers its community members to integrate their faith and their life?

FOCUS AREAS:

1. Catholic School Community

How effectively does the school, as an authentic Catholic community, promote and support active Catholic witness and practice in the school and in the parish, of which it is an integral part?

1. All staff are assisted to understand what the integration of faith and life means from a Catholic perspective.
2. The principal, DRS and other teachers in CI 47 special character positions (previously S464) are active witnesses of faith in the school and in their parish/es, and present the face of Christ to others.
3. The Catholic concept of community is evidenced in the school through the co-operation of all members of the school as brothers and sisters in Christ.
4. The culture of the school is characterised by warm relationships at all levels, friendly communications, active listening, and a sense that all are treated with respect.
5. The school is a welcoming environment where all are treated with hospitality, aroha and courtesy.
6. The theological virtues of faith, hope and love are tangible in the environment and in relationships.
7. There are opportunities for the celebration of the Sacrament of Reconciliation.
8. The school participates in school-parish/Eucharistic community¹⁶ celebrations of the sacraments, especially the Eucharist.
9. The school is proactive in promoting the involvement of ākonga and their whānau in the life of their parish/Eucharistic community.
10. The school has an impact on the parish and the parish has an impact on the school – the parish and the school work together.
11. Displays and symbols provide witness to the Catholic identity of the school.
12. The charism of the school is actively promoted as a lens through which the school's Catholic identity and commitment to Jesus Christ are made visible.
13. There are explicit links made between encountering Christ and school prayer and liturgies.

¹⁶ See Glossary at the back for the definition of a Eucharistic community

2. Partnership and Collaboration

Recognising that education is a collaborative responsibility, how effectively does the school build strong commitments to all the groups it relates to, including its whānau, its parish(es)/Māori Eucharistic communities, its founding religious congregation, its Proprietor and its Bishop? How do ākongā develop an understanding of, and respect for, the cultural diversity of New Zealand?

1. As a community within the larger communities of the parish and the diocese, the school seeks to work collaboratively with the parish(es)/Eucharistic communities and with the diocese.
2. Acknowledging that whānau are the first educators of their tamariki, the school actively works to build whānau participation in the faith development of their tamariki, their education and in the wider life of the school and parish.
3. The school provides clear information and opportunities for parents to understand school systems and practices in general and in relation to Catholic Character.
4. The school operates and educates in culturally appropriate ways.
5. The school recognises the cultural diversity of New Zealand, and works to ensure that ākongā develop an understanding of this diversity, and that all cultures are honoured and respected.
6. Communication channels are effective, accessible to all, and available in the language of various parent groups.
7. The parent body is consulted and communicated with in culturally appropriate ways. Wherever possible parents' ideas are incorporated into the life of the school.
8. The school supports and cooperates with other Catholic schools. It works to create smooth transitions for students between early childhood education and primary schooling, and between primary schooling and secondary schooling in the local area.
9. The school supports and cooperates with its neighbouring State schools.

3. Te Tiriti o Waitangi

How effectively does the school, as an authentic Catholic community, demonstrate a strong commitment to the principles of Te Tiriti o Waitangi/The Treaty of Waitangi, reflecting the commitment of the Aotearoa New Zealand Catholic Church to bicultural partnership?

1. The school has a commitment to, and educates for, a deeper understanding of the principles of Te Tiriti o Waitangi, and the bicultural history of Aotearoa New Zealand.
2. The school has a commitment to learning and teaching about local Māori and pakehā history.
3. The school recognises Māori as tangata whenua, has an understanding of the principles of partnership and participation, takes part in authentic consultation with

its Māori community, and works to resolve any barriers to partnership and participation.

4. The school works to develop an understanding of Te Ao Māori and communicates this with all ākonga.
5. The school works to develop an understanding of Māori wairua/spirituality and it incorporates tikanga Māori, te reo Māori, and karakia into the daily life of the school.
6. The school works to build up relationships with Māori whānau, so that they feel valued in the school.
7. The school pays particular attention to developing an understanding of the cultural background of every Māori ākonga, honouring the identity, knowledge and values of each ākonga.¹⁷

3. Pastoral Care

How effectively does the school ensure that education occurs in a safe, nurturing environment supported by a strong pastoral care network in which each member of the community is known, respected, cared for and aware that they are loved unconditionally by God?

1. The sacred dignity (mana and tapu) of each individual is acknowledged and upheld.
2. As people of the Gospel and in the light of the preferential option for the poor, staff and students treat each person with respect and aroha, and reach out to those most in need.
3. Systems are in place to ensure that ākonga are personally known, cared for, and provided with support as required.
4. Pastoral care systems and procedures are responsive to the needs of ākonga, and reflect Gospel values and Church teachings.
5. Ākonga, staff and whānau are aware of the school's pastoral care systems and ways of accessing them.
6. Behaviour management processes are fair, clear to all, and guided by restorative practice, linked to Catholic social teaching.¹⁸
7. Ākonga are enabled to develop the skills to take responsibility for their own behaviour.
8. Pastoral care systems make use of the support offered by Church, government, local authority and social service agencies.

¹⁷ Useful documents include New Zealand School Trustees Association self-review tool, *Hautū*, MOE *Ka Hikitia*, ERO document *Educationally powerful connections with parents and whanau*.

¹⁸ pb4L.tki.org.nz provides useful information.

9. The school chaplain is an integral member of staff, with a significant role in pastoral care.
10. The school has a system for working with parish(es), Eucharistic communities and whānau to identify those in need, and responds to needs in a practical way.
11. The school welcomes ākonga with a diversity of ability and learning needs and provides appropriate assistance and programmes to enable them to fulfill their potential.
12. Staff are affirmed and appreciated, and their wellbeing is supported.

4. Service and Outreach

Recognising that each person is called as a Christian to take care of others and to work for justice and equality, in what ways does the school explicitly base service and outreach activities in the Gospel message, and grow the practice and understanding of caring for others?

1. The school develops an explicitly Christ-centred culture of justice, service and outreach in local, national and international communities.
2. The school supports local and national Catholic groups in their campaigns and activities (e.g. Caritas, St Vincent de Paul - Young Vinnies groups).
3. The school provides opportunities for ākonga to contribute actively to the life of the local community.
4. Ākonga show a willingness to give their own time to assist others in their school, parish and community, and to lead where appropriate. They understand that such actions are based on the Gospel message and the person of Jesus Christ.
5. The school recognises and acknowledges the service efforts of ākonga.

DIMENSION 4: TE KAITIAKITANGA ME TE WHAKAPAKARI I TE TUAKIRI KATORIKA | SAFEGUARDING AND STRENGTHENING CATHOLIC CHARACTER

How does the school, in its stewardship, and its compliance with legal obligations, safeguard and strengthen its Catholic identity?

FOCUS AREAS:

1. Stewardship

How effectively does governance and management safeguard and strengthen Catholic Character?

Organisation:

1. The Board of Trustees ensures that the vision and strategic direction for the school clearly and explicitly reflect the Catholic Character of the school.
2. The Board of Trustees recognises that the school, as an ecclesial entity, has a responsibility for helping to form Christ in the lives of others, and is committed to this work.
3. Strategic planning includes the aim of continued strengthening of Catholic Character in the school.
4. Board governance policies reflect Catholic Character.
5. The Board receives regular reports from management on Catholic Character and on Religious Education.
6. The Board has a rolling plan for Catholic Character internal evaluation, which ensures the review of one of the main dimensions of Catholic Character each year. The review involves staff, ākongā, whānau and parish personnel.
7. The process of internal evaluation enables good practice to be affirmed and identifies next steps for growth in the areas of both Catholic Character and Religious Education.
8. The Catholic Character and Religious Education goals in the school's strategic and annual plans arise from rigorous self-review and are focused on growth and improvement.
9. School policy statements explicitly reflect Catholic Character to ensure that decision making is from a Catholic perspective.
10. Catholic Character responsibilities at Board and staff level are clearly understood, and are reviewed on a regular basis.
11. All school promotional material reflects the Catholic identity of the school.
12. The school's annual budget provides separate funding lines for Catholic Character and for Religious Education.
13. Board of Trustees members have access to, and are familiar with, the following documents: *The Declaration*, the *Handbook for Boards of Trustees of Catholic Schools*, any diocesan guidelines for the appointment of a principal, the Certification

Handbook, *The Catholic Education of School-Age Children*, and *Catholic Character Review for Development* (i.e. this document).

Employment:

1. Procedures for advertising and making teaching appointments to positions are in line with the requirements of Schedule 6 of the Education and Training Act 2020 and the school's Integration Agreement, as outlined in the *Handbook for Boards of Trustees of Catholic Schools*.
2. Documentation supplied to people seeking employment includes information about the nature of the Catholic school, and what is expected of staff in a Catholic school.
3. In making staff appointments, due recognition is given to applicants' qualifications in relation to Catholic Character, e.g Certificate in Catechetics, Diploma in Religious Education, current qualifications offered by TCI etc.
4. School policy shows a commitment to appointing the most suitable and qualified teachers of Religious Education.
5. When an offer of appointment is made the letter template provided by NZCEO is used.
6. Job descriptions and appraisal systems indicate the specific responsibilities of staff members to actively support the Catholic Character of the school.
7. Catholic Character goals are set for the principal and every staff member.
8. The Teaching Council *Code of Ethics and Standards for the Teaching Professions* are used, including the *Catholic School Elaboration: Standards for the Teaching Profession*¹⁹
9. The *Code of Ethics for Catholic Schools* is known by all staff and adhered to.
10. Student teachers, relief teachers, health professionals and other contracted staff are provided with information so that they understand and accept the Catholic Character of the school.
11. In secondary schools there are robust processes in place for checking acceptability for CI 47 and CI 50 special character positions (previously S464 and S467 positions).

Professional Development:

1. The whole Board of Trustees engages in an ongoing programme of Catholic Character formation. Members engage in regular Catholic Character professional development, including the principles of Catholic social teaching, and their application to Board responsibilities.

¹⁹ See <https://www.nzceo.org.nz/catholic-elaborations-education-councils-standards-teaching-profession/>

2. The induction programme for all new trustees ensures that they understand their Catholic Character responsibilities.
3. The Board of Trustees ensures that opportunities and financial assistance are available for at least the Principal and DRS to take part in an annual retreat and/or to have ongoing spiritual accompaniment.

Enrolment:

1. Enrolment procedures and policy statements are transparent and meet the requirements of the Integration Agreement and Ministry of Education regulations.
2. The enrolment policy and practice of the school does not discriminate on the basis of race, disability, academic potential, sporting ability or socio-economic situation.
3. No one eligible to attend is denied a Catholic education on the basis of inability to pay attendance dues.

2. Legal Obligations

The school is compliant with its Integration Agreement with regard to:

- ❖ Number of special character Cl 47 positions held (excluding principal and DRS) compared with number or percentage of Cl 47 positions specified in the Integration Agreement or the supplementary schedule
- ❖ Maximum roll compared with actual roll at time of review
- ❖ Number of preference students
- ❖ Number of non-preference students, if any (lists are kept)
- ❖ The Board of Trustees consults, communicates and works with the Proprietor on matters relating to Catholic Special Character.

(The full Legal Obligations Annual Attestation document is attached for reference, in the Appendixes.)

APPENDIX 1: NGĀ HERENGA TURE – LEGAL OBLIGATIONS

Specific practical compliances: The **Attestation** questions on the following pages are designed to assist Boards of Trustees and school administrators in complying with their legal obligations in respect of the Catholic Special Character dimension of their schools as well as the implementation of the principles inherent in the Special Character statement of the Integration Agreement. These obligations include the formulation and maintenance of systems and procedures to ensure that the Proprietor can readily implement his/her legal rights and responsibilities as they relate to the Catholic Special Character.

“The Proprietor of a State integrated school shall...

- (a) Continue to have the responsibility to supervise the maintenance of the education with a special character provided by the school;
- (b) Continue to have the right to determine what is necessary to preserve and safeguard the special character of the education provided by the school and described in the integration agreement.”

Education and Training Act 2020 Schedule 6: Clause 1 (3)

[Attestation to be completed annually and sent to the Proprietor]

DRAFT

SPECIAL CHARACTER COMPLIANCES REQUIRED OF BOARDS OF TRUSTEES OF NEW ZEALAND CATHOLIC INTEGRATED SCHOOLS

ATTESTATION

The responses in the following pages are a true and fair record of the operation of the Board of Trustees in respect of the Special Character compliances **which** are required of Boards of Trustees of Integrated Schools

Signed: _____ Date: _____
(Chairperson, Board of Trustees)

Signed: _____ Date: _____
(Principal)

School: _____

Address: _____

Date of Declaration: _____

COMPLIANCE REPORT

The abbreviations below refer to statutes as follows:

Ed. & Training Act = Education and Training Act 2020 Schedule 6 (State Integrated Schools)

CI 47 = Education and Training Act 2020 Schedule 6: Clause 47 (previously S464 Part 33 Education Act 1989)

I.A. = Integration Agreement (Note that clause and schedule numbers may not be the same for all Integration Agreements.)

Circle **Yes**, **No** or **Unsure** in the response space. Attach relevant evidence as applicable or provide reference to Strategic Plan etc as appropriate.

1. Special Character Positions (CI 47)

- 1.1. Does the Board and/or the Principal keep an up-to-date record of all staff members who hold CI 47 (tagged) positions?

Board Response : Yes No Unsure

- 1.2. Does the number of teachers in CI 47 (tagged) positions comply with the number required by your Integration Agreement? [*c.f. clauses 14-19, or thereabouts, plus Fourth Schedule in primary school I.A.*]

Board Response : Yes No Unsure

- 1.2.1. Number of CI 47 (tagged) positions specified for your school (excl. principal and DRS) :

- 1.2.2. Number of teachers currently holding CI 47 (tagged) positions :

- 1.2.3. Reasons for any discrepancy:

- 1.2.4. Date Proprietor was consulted on discrepancy :

- 1.3. Have vacancies for CI 47 (tagged) positions occurred this year?

Board Response : Yes No Unsure

- 1.4. Have they been advertised as CI 47 (tagged) positions?

Board Response : Yes No Unsure

1.5. Before advertising to fill vacancies for any Cl 47 (tagged) position, does the person responsible for placing the advertisements check to ensure that the legally required wording is included? [c.f. Ed. & Training Act, Cl 47 plus relevant clauses of I.A.]

Board Response : Yes No Unsure

1.6. In primary schools, is the Proprietor given the opportunity to ensure that all applicants for Cl 47 (tagged) positions are acceptable in terms of the Special Character? [c.f. Ed. & Training Act, Cl 52, plus I.A. clauses 6 (a) & 6 (b)]

Board Response : Yes No Unsure

1.7. In secondary schools, do the Board, the Principal and/or the Staff Appointments Committee (or its equivalent) give appropriate weight to the views of the Proprietor's Appointee(s) regarding the acceptability of applicants for Cl 47 (tagged) positions? [c.f. Ed. & Training Act, Cl 46 (2)]

Board Response : Yes No Unsure

1.8. Does the Board's Staff Appointments Committee (or its equivalent) have at least one Proprietor's Appointee among its members? [c.f. Ed. & Training Act, Cl 46 (2)]

Board Response : Yes No Unsure

1.9. Where applicable, does the Board's allocation of management units for the position of Director of Religious Studies (or its equivalent) reflect the paramount importance of Religious Education in the school and other Special Character dimensions?

Board Response : Yes No Unsure

2. Maximum Rolls

2.1. Is the school roll within the maximum number set in the school's Integration Agreement?

Board Response : Yes No Unsure

_____ Maximum roll _____ Actual Roll

3. Preference Students

3.1. Does the Principal and/or Board keep an up-to-date database of which students are in the preference category, with the necessary evidence to verify their preference status? [c.f. Ed. & Training Act Cl 26, plus I.A. clause 10(b) or thereabouts.]

Board Response : Yes No Unsure

3.2. Does the Principal and/or Board keep an up-to-date waiting list of preference enrolments, particularly if the school has an Enrolment Scheme?

Board Response : Yes No Unsure

4. Non-Preference

- 4.1. Does the number of non-preference students comply with the number/percentage set in the school's Integration Agreement?

Board Response : Yes No Unsure

4.1.1. Permitted number or percentage set in Integration Agreement

4.1.2. Current actual number or percentage

4.1.3. Reason for discrepancy (if in excess)

4.1.4. Date Proprietor was consulted on discrepancy and approval gained :

- 4.2. Does the Principal and/or Board keep an up-to-date database of which students are in the non-preference category? [*c.f. Ed. & Training Act Cl 26, plus I.A. clause 10(b) or thereabouts.*]

Board Response : Yes No Unsure

- 4.3. Does the Principal and/or Board keep an up-to-date waiting list of non-preference enrolments, particularly if the school has an Enrolment Scheme?

Board Response : Yes No Unsure

5. Religious Education Philosophy

- 5.1. Are there effective monitoring measures in place to ensure that the school's Religious Education programme and "religious observances" follow any guidelines published by the New Zealand Catholic Bishops Conference? [*Ed. & Training Act Cl 29(1), plus I.A. Special Character definition in clause 5 or thereabouts.*]

Board Response : Yes No Unsure

- 5.2. Is the school's Religious Education programme, and its implementation, "responsive to the sensitivities of pupils and parents of different religious or philosophical affiliations", particularly where "(participation) in religious observances and religious instruction concerned with particular observances" is concerned? [*Ed. & Training Act, Cl 29 (2)*]

Board Response : Yes No Unsure

6. General Board Policy and Practice

6.1. Does the Board’s committee structures, policies and meeting structure reflect the paramount importance of the Special Character, Religious Education and religious observances/Education with a Special Character [Ed. & Training Act, CI 1, Section 211, CI 240]

Board Response : Yes No Unsure

6.1.1. Is there a Special Character agenda item at each Board meeting?

Yes / No

6.1.2. Is there an active Special Character sub-committee of the Board?

Yes / No

6.1.3. Does the Board have a plan for developing and enhancing the Special Character of the school including a specific annual school plan goal relating to Special Character?

Board Response : Yes No Unsure

6.2. If the Integration Agreement contains a Schedule which describes the special educational ethos or charism of the school, has the Board put in place effective measures to ensure the preservation, growth and enhancement of that charism? [I.A. Fifth Schedule, some Agreements only.]

Board Response : Yes No Unsure

6.3. Does the Board fully collaborate with the Proprietor in regard to the appointment, employment (by the Proprietor) and relevant activities of a Chaplain or Chaplaincy Team? [Ed. & Training Act, CI 53 (2), plus I.A. clause 21.]

Board Response : Yes No Unsure

6.4. Does the Board have in place policies and systems to continually monitor all school activities to ensure that they are “at all times...conducted and operated so as to maintain and preserve the School’s Special Character”? [I.A. clause 2.]

Board Response : Yes No Unsure

6.5. Does the Board give permission to use the school premises or equipment when the Proprietor requests permission to do so? [Ed. & Training Act, Cl 38, plus I.A. clause 3(b)(i)]

Board Response : Yes No Unsure

7. Safeguarding practices

7.1. Can the Board and Principal confirm that the overriding principle of the Safeguarding Policy, adopted by the Proprietor, is reflected in the wording of the school’s Child Protection Policy? [<https://safeguarding.catholic.org.nz/>]

Board Response : Yes No Unsure

7.2. Can the Board and Principal confidently attest that the school has sufficient measures in place to ensure the safety of children and vulnerable adults during all school related activities? [<https://safeguarding.catholic.org.nz/>] [Children’s Act 2014]

Board Response : Yes No Unsure

8. Consulting, collaborating with and reporting to the Proprietor

8.1. Does the Board and the Principal ensure that “the Proprietor, together with his servants, agents and licensees, ...have at all reasonable times access to the school to ensure that the Special Character of the School is being maintained”? [c.f. Ed. & Training Act, Cl 39 (2)(i), plus I.A. clause 10(b) or thereabouts.]

Board Response : Yes No Unsure

8.2. Does the Board and the Principal ensure that “the Proprietor, together with his servants, agents and licensees, ...have at all reasonable times access to the land and buildings of the School constituting the school premises sufficient to enable him to exercise the powers and carry out the responsibilities vested in him and imposed on him by the Education and Training Act”? (formerly the Education Act) [c.f. I.A. clause 13]

Board Response : Yes No Unsure

8.3. Does the Board reasonably co-operate with the Proprietor in matters relating to the number of Proprietor's Appointees, their selection (where appropriate) and their role as the Proprietor's Appointees on the Board?

Board Response : Yes No Unsure

8.4. Are there effective measures in place to ensure that the Board consults with and reports to the Proprietor, [Ed. and Training Act, Cl 24(4)] as and when appropriate, on all matters pertaining to the Catholic Character, particularly:

8.4.1. The Catholic Character dimension of the performance management system, including job descriptions professional standards, performance agreements and annual performance appraisals of all staff employed at the school;

Board Response : Yes No Unsure

8.4.2. morally sensitive areas such as matters dealt with by the School Guidance Counsellor;

Board Response : Yes No Unsure

8.4.3. relevant parts of all school curricula and programmes;

Board Response : Yes No Unsure

8.4.4. how the Board and Principal effectively manage and monitor the work of any health centre or health professionals who are employed or who come on site;

Board Response : Yes No Unsure

8.4.5. all relevant parts of all Board policies;

Board Response : Yes No Unsure

8.4.6. the general ethos, environment and culture of the school;

Board Response : Yes No Unsure

8.4.7. the relationships between staff members, and their colleagues, their students and the school community?

Board Response : Yes No Unsure

8.4.8. the school charter, strategic plan and annual plan, [Ed. & Training Act, Section 139] particularly Special Character goals?

Board Response : Yes No Unsure

8.4.9. Date of last consultation with Proprietor :

8.5. Does the Proprietor's Appointees:

8.5.1. consult with the Proprietor, or their agent, on a regular basis?

Board Response : Yes No Unsure

8.5.2. keep the Proprietor, or their agent, up-to-date on all matters concerning the Special Character?

Board Response : Yes No Unsure

8.5.3. report to the Proprietor, or their agent, at least annually and in detail, on the state of the Special Character and all matters related to it?

Board Response : Yes No Unsure

8.5.4. Date of last report :

9. Health Curriculum

9.1. Is the Health Curriculum delivered in accordance with the Special Character of the school?

Board Response : Yes No Unsure

9.2. Do the principal and relevant senior staff take appropriate action, including consulting with both the community and the Proprietor, [Ed. & Training Act s.91] to ensure that the Health Curriculum programmes and their delivery reflect the Special Character of the school?

Board Response : Yes No Unsure

9.2.1. Date of last consultation with Proprietor on the health curriculum

9.3. Is the DRS actively involved in the planning of the personal relationships and sexuality components of the health curriculum?

Board Response : Yes No Unsure

9.4. How many staff have gained qualifications in CFLE or attended either the Understanding Sexuality course or the Having Life to the Full course?

9.5. How many staff are planning to attend a course?

10. Attendance Dues and Donations

10.1. Does all school documentation, including website information, prospectuses and bills sent out by the school, clearly distinguish between Attendance Dues which are a legal debt, and any other contribution requested by the Proprietor or by the school, which are a donation and are not compulsory? [c.f. Ed. & Training Act, Cl 32-37.]

Board Response: Yes No Unsure

10.2. Does the school take steps to inform the Proprietor, and follow the Proprietor's requirements, if it is aware that a family may have difficulty in paying Attendance Dues?

Board Response: Yes No Unsure

APPENDIX 2: NEW ZEALAND LEGISLATION SPECIAL CHARACTER OBLIGATIONS REQUIRED OF BOARDS OF TRUSTEES OF CATHOLIC INTEGRATED SCHOOLS

THESE REQUIREMENTS ARE STATED IN:

- Schedule 6 of the Education and Training Act 2020 (previously Part 33 of The Education Act 1989 and Private Schools Conditional Integration Act 1975)
- Individual Integration Agreements for each Catholic School,
- Education and Training Act 2020

11. The Education and Training Act 2020 (Ed. Act) Schedule 6 imposes Special Character compliances on Boards of Trustees of Catholic schools by virtue of the following sections.

- 1.1. Section 10: "This Act shall bind the Crown." (The Board of Trustees is a Crown agency.)
- 1.2. Schedule 6: Clause 1 (1): "An integrated school (has) the right to reflect through its teaching and conduct the education with a special character provided by it"
- 1.3. Schedule 6: Clause 1 (2): "Integration shall not jeopardise the special character of an integrated school."
- 1.4. Schedule 6: Clause 1 (3): "The Proprietor of an integrated school shall...
 - (a) Continue to have the responsibility to supervise the maintenance of the education with a special character provided by the school;
 - (b) Continue to have the right to determine from time to time what is necessary to preserve and safeguard the special character of the education provided by the school and described in the integration agreement."
- 1.5. Section 211 states that an integrated school is subject to the same legislation as other schools in the State system but that these other enactments "shall in all respects be read subject to Schedule 6: Clause 1 (see above) and Schedule 6: Clause 58 of this Act (see below), and to other provisions of this Act that relate to integrated schools."
- 1.6. Schedule 6: Clause 3 lists the matters which may be included in an integration agreement. These include a description of the special character; a prescription of religious instruction and observances which are to form part of the school programme; limits on the number of non-preference pupils/students; and "any other matter which bears upon the education with a special character for which the school was originally established".
- 1.7. Schedule 6: Clause 13 gives the Proprietor authority to cancel the integration agreement (which would automatically remove all the powers of the Board of Trustees) "if it appears to the Proprietors on reasonable grounds that the special character of the integrated school has been or is likely to be jeopardised". (See also The Integration Agreement at 2.0 below.)
- 1.8. Schedule 6: Clause 12 gives the Minister the power to cancel the integration agreement if it appears to her/him "on reasonable grounds that the Proprietors or board...is not

sufficiently carrying out the functions and obligations under this Act or under the integration agreement”. (Clause 16 also empowers the Minister to disestablish and close the school for the same reasons as those stated in Clause 11)

- 1.9. Schedule 6: Clause 24 (3): “The powers of control and management of the board of a State integrated school are subject to clauses 1 and 2; to give effect to sub-clause (3), the board of a State integrated school must provide for adequate consultation between the board and the proprietor of that school.” This section clearly points to considerable input by the Proprietor on any and all matters which pertain, or are likely to pertain, to the Special Character.
- 1.10. Schedule 6: Clause 26 gives preference of enrolment to children whose parents “have a particular or general philosophical or religious connection with a State integrated school”. (See also **The Integration Agreement** at 2.0 below.)
- 1.11. Schedule 6: Clause 27 states that: “By enrolling a student at a State integrated school a parent is taken to have accepted as a condition of enrolment that the student is to participate in the general school programme that gives the school its special character.” (But see 1.14 below on Clause 29 (2).)
- 1.12. Schedule 6: Clause 28 states that “...the general school programme (prescribed by the Education Act) must reflect the education with a special character provided by the State integrated school, and religious and other examples may be used to reinforce teaching throughout the school day.”
- 1.13. Schedule 6: Clause 29 (1) also provides for the mandatory inclusion in the school programme of those religious observances and religious instruction which form part of the education with a special character, “in accordance with the terms and conditions prescribed in the integration agreement relating to that school.”
- 1.14. Schedule 6: Clause 29 (2) requires integrated schools to “be responsive to the sensitivities of students and parents of different religious or philosophical affiliations” and “not require any such students to participate in religious observances and religious instruction concerned with particular observances if the parents of that child state at any time that they do not wish that student to participate.”
- 1.15. Schedule 6: Clause 38: “The school office of a State integrated school may be used for the purpose of communication between the Proprietor of the school and the parents of students enrolled at the school, and for other purposes related to the benefit of the school and the students.”
- 1.16. Schedule 6: Clause 46 (2) states that when a Board of Trustees “delegates to a committee the power to appoint a teacher or to recommend the appointment of a teacher, that committee must contain at least one of the persons appointed to the board by the Proprietor.”
- 1.17. Schedule 6: Clause 47 requires that advertisements for the positions of Principal [Cl 47(a)], Director of Religious Studies [Cl 47(b)(ii)], and a designated number of other teaching positions [Cl 47(c)(ii)] “shall state that a willingness and ability to take part in religious instruction appropriate to that school shall be a condition of appointment”. (See also **The Integration Agreement** at 2.0 below.) Clause 47 (b) (ii) further states that the

Director of Religious Studies “shall be a member of the normal staffing entitlement of the school”.

- 1.18. Schedule 6: Clause 47 states that teachers appointed to Clause 47 special character positions (tagged) must accept the advertised requirement (the “tag”) as a condition of their appointment.
 - 1.19. Schedule 6: Clause 50 is the section which authorises the special character position which is applied to the position of Deputy Principal in all Catholic schools. (See also **The Integration Agreement** at 2.0 below.) This section provides for the creation and advertising of “special positions” requiring particular capabilities on the part of the teachers holding them. It also states that acceptance of the advertised requirements is a condition of appointment.
 - 1.20. Schedule 6: Clause 52 requires the Board of Trustees of an integrated primary school to consult with the Proprietor before appointing a teacher to a Clause 47 or Clause 50 position. The Board must then appoint only from those applicants who are acceptable to the Proprietor “in terms of the special character of the school or in terms of the advertisement”. (See also **The Integration Agreement** at 2.0 below.)
 - 1.21. Schedule 6: Clause 53 (1) authorises the Board of Trustees to allow “any retired teacher” to undertake “voluntary tasks relating to the beliefs and instructions that are the foundation of the school’s special character.” (See also **The Integration Agreement** at 2.0 below.)
 - 1.22. Schedule 6: Clause 53 (2) authorises the Proprietor to “employ any person, whether as a chaplain or otherwise” for duties relating to the religious instruction that forms part of the special character. The Proprietor is required by section 53 (3) & (4) to notify the Board of the names of any person so employed, and that person “shall not be paid by the controlling authority or be in any way a charge on money appropriated by Parliament.”
 - 1.23. Schedule 6: Clause 58 states Schedule 6 of the Education and Training Act 2020 “shall prevail in respect of integrated schools” wherever this Act deals with the same or similar subject matter as that in the Education Act 1964, the State Sector Act 1988, the School Trustees Act 1989, or other parts of the Education Act 1989, or any regulations made under those Acts or any enactment repealed by those Acts.
2. **THE INTEGRATION AGREEMENT** is derived from Schedule 6 of the Education and Training Act 2020 (previously Part 33 of the Education Act and the Private Schools Conditional Integration Act), with all the legal force of that Act. It is a unique legal instrument in New Zealand law. As such it imposes Special Character compliances on Boards of Trustees of Catholic schools by virtue of the following. (Please note that clause numbers may vary from Agreement to Agreement.)
- 2.1. Clause 2 “The School’s Special Character as is hereunder described, shall incorporate the Education with a Special Character as provided in the School and it is hereby agreed and declared that the school shall at all times be conducted and operated so as to maintain and preserve the School’s Special Character.” The clause goes on to state that the remainder of the Agreement is to be interpreted “so as to maintain and preserve the Special Character of the School.”

- 2.2. Clause 5 “The Special Character of the School is that it is a Roman Catholic School...established by the Roman Catholic (Arch)Bishop of the (Arch)Diocese of...(or established by a particular Religious Order) for the Roman Catholic community of the (Arch)Diocese of...which promotes and supports the School and of which the School is part, to provide and continue to provide Education with a Special Character, that is to say:
- 11.1. *The School is a Roman Catholic School in which the whole School community through the general School programme and in its religious instruction and observances, exercises the right to live and teach the values of Jesus Christ. These values are as expressed in the Scriptures and in the practices, worship and doctrine of the Roman Catholic Church, as determined from time to time by the Roman Catholic (Arch)Bishop of the (Arch)Diocese of...”*
- 11.2. *Note that the definition of Special Character of Māori Boarding Schools contains the additional element of taha Māori.*
- 2.3. A number of Integration Agreements have a Schedule (usually the Fifth Schedule) which outlines the special educational ethos or charism of the particular school. This is derived from the charism of the Religious Institute that founded the school or who staffed it on behalf of a Bishop.
- 2.4. Clause 3(b)(i): “At the request of the Proprietor, the Board of Trustees may grant the use of the School premises and chattels to the Proprietor or other person or persons at any time when the School premises and chattels are not required for school purposes and the Board of Trustees shall not arbitrarily withhold its consent. The Board of Trustees may require the Proprietor or other person or persons to pay a reasonable fee to the Board of Trustees as a condition of such use.” This is followed by sub-clause (ii) which allows the Board of Trustees, “with the consent of the Proprietor...to grant the use of the School premises and chattels to any person or persons” under the same conditions of consent and payment as those in sub-clause (i).
- 2.5. Clause 6(a) states that the Proprietor “shall continue to have the responsibility to supervise the maintenance and preservation of the Education with a Special Character provided by the School.”
- 2.6. Clause 6(b) gives the Proprietor the right to determine from time to time what is necessary to preserve and safeguard the Special Character of the Education provided by the School and described in this Deed of Agreement”.
- 2.7. Clause 6(c) reconfirms that the Proprietor has the power, conferred by Clause 13 (1) of the Education and Training Act 2020 (see above), to cancel the Integration Agreement if he/she considers that “the Special Character of the School...has been or is likely to be jeopardised or the Education with Special Character provided by the School...is no longer preserved and safeguarded.”
- 2.8. Clause 10(b) prohibits the Board of Trustees from enrolling any pupils/students unless the Proprietor has stated that the parents have established “a particular or general religious connection with the Special Character of the School”.
- 2.9. Clause 10(a) prohibits the Board of Trustees from enrolling more than the specified number (percentage) of non-preference pupils/students and requires the Board to “endeavour to reasonably distribute them through the range of classes offered by the School.”

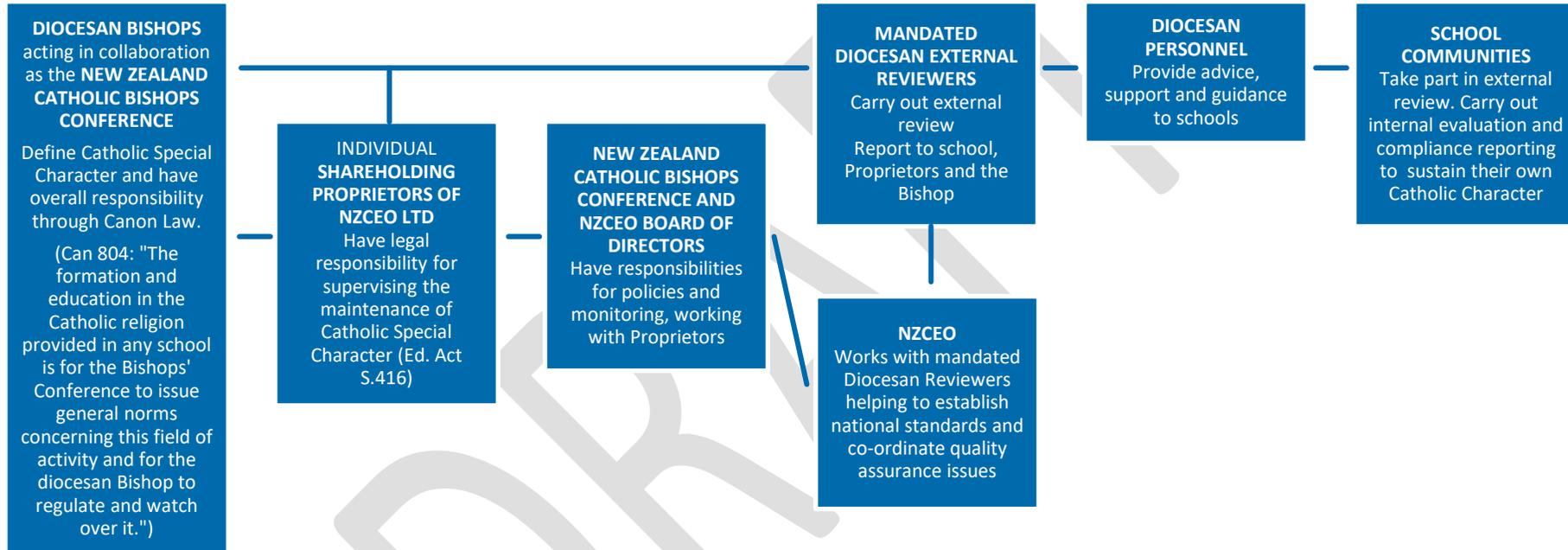
- 2.10. Clause 11 states that “as religious observances and religious instruction form part of the Education with a Special Character provided by the School, religious observances and religious instruction in accordance with the determination made from time to time by the Roman Catholic (Arch)Bishop of the (Arch)diocese of...shall continue to form part of the School programme in accordance with Clause 28 and Clause 29 of the Education and Training Act 2020.”
- 2.11. Clause 12 “The Proprietor, together with his servants, agents and licensees, shall...have at all reasonable times access to the school to ensure that the Special Character of the School is being maintained.”
- 2.12. Clause 13 “The Proprietor, together with his servants, agents and licensees, shall have at all reasonable times access to the land and buildings of the School constituting the School premises sufficient to enable him to exercise the powers and carry out the responsibilities vested in him and imposed on him by Schedule 6 of the Education and Training Act 2020.”
- 2.13. Clauses 14-19 (or thereabouts) reiterate the provisions of Clauses 27, 48, and 50 of Schedule 6 of the Education and Training Act 2020 (see above) in respect of the appointment of the Principal, Deputy Principal, DRS and other teachers in special character positions. The wording of the “tag” for the position of Deputy Principal is different for primary and secondary schools, but in both cases it is a requirement that the prescribed wording be included in any advertisement for the position of Deputy Principal – and for that position only.
- 2.14. Clause 20 reiterates the right of the Proprietor to arrange, with the consent of the Board of Trustees, “for any retired teacher to undertake voluntary tasks to assist the School with the teaching of appropriate Religious observances and Religious instruction...” (See Clause 53 (1) of the Education and Training Act 2020 above.)
- 2.15. Clause 21 reiterates the provisions of Clause 53 Section 470(2) and (3) of the Education and Training Act 2020 (see above) whereby the Proprietor and the Board of Trustees may agree to the former “employing any person as a Chaplain or otherwise” for the purposes stated in those Sections of the Act.
- 2.16. The Schedules: Most of the Schedules attached to Integration Agreements deal with property matters. One exception is referred to in 2.3 above. The other major exception is the Staffing Schedule (usually the Fourth) which accompanies every primary school Agreement. The latter specifies the number of teachers in the school who must be holding “tagged” positions (other than Principal and Director of Religious Studies), relative to the total staffing entitlement.
- 1. THE EDUCATION AND TRAINING ACT 2020** also contains sections outside of Schedule 6 which apply specifically to integrated schools and which have implications, including compliance requirements, for their Boards of Trustees.
- 1.1. Section 119 (e) and 120 (4) provides for “not more than 4 trustees appointed by the school’s Proprietor”.
- 1.2. Section 120 (2) & (4) authorises Proprietors to vary the number of their Appointees by reducing it to less than 4 or increasing it to not more than 4. The section provides for a Board to seek the Proprietor’s consent to any reduction. A Proprietor intending to vary **the**

number of Appointees is required to give “written notice to the Board”. The written notice must also specify the time of the change, which can be the date on which trustees go out of office prior to Board elections, or upon the appointment of a commissioner to replace the Board (whichever is earlier), or (if the number is to be reduced) on a date specified. Where there is to be a reduction in the number of Appointees, the notice must “contain the dismissal (with effect on that day) of enough trustees appointed by the Proprietor to give effect to the reduction consented to”.

- 1.3. Schedule 1: Section 1 states (1) It is desirable, so far as is reasonably practicable for every Board to reflect the ethnic and socio-economic diversity of the student body; gender equality; the character of the school and the character of the community it serves; and management expertise and experience. Section 1 (2) requires those responsible for co-opting or appointing members (including the Proprietor) to have regard to Section (1).
- 1.4. Education Act 1989 Section 61 (3)(b)(iii) (in place until 2023 when the Education and Training Act comes into effect) ensures that in the long-term strategic planning section of the school charter “any aims or objectives that designate the school’s special characteristics or its special character (within the meaning of this Act)” must be included.

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APPENDIX 3: AREAS OF RESPONSIBILITY FOR CATHOLIC SPECIAL CHARACTER REVIEW FOR DEVELOPMENT



1. NEW ZEALAND CATHOLIC BISHOPS CONFERENCE – NZCBC

- 1.1. The NZCBC approves the definition of “Special Character” for Catholic Integrated Schools. The NZCBC has the responsibility under Canon Law for “*the formation and education in the Catholic religion provided in any school*”. The Bishops Conference, acting in collaboration, has the ultimate responsibility for the determination of issues relating to the maintenance and preservation of Special Character in a Catholic school.

The Code of Canon Law provides as follows:

Can. 804: The formation and education in the Catholic religion provided in any school, and through various means of social communication, is subject to the authority of the Church. It is for the Bishops Conference to issue general norms concerning this field of activity and for the Diocesan Bishop to regulate and watch over it.

Can. 806: The Diocesan Bishop has the right to watch over and inspect the Catholic schools situated in his territory, even those established or directed by members of religious institutes. He has also the right to issue directives concerning the general regulation of Catholic schools; these directives apply also to schools conducted by members of a religious institute, although they retain their autonomy in the internal management of their schools.

2. BOARD OF DIRECTORS OF NEW ZEALAND CATHOLIC EDUCATION OFFICE (NZCEO), AND PROPRIETORS

- 2.1. The Board of Directors of NZCEO, acting with individual Shareholding Proprietors, is responsible for helping to provide what is necessary to maintain and supervise the Catholic Special Character of each school.
- 2.2. The Board, through the staff of the Office, is responsible for monitoring the overall process and for policy development in consultation with reviewers, Shareholding Proprietors and other interested parties.
- 2.3. Individual Trust Board Proprietors have legal responsibility for supervising the maintenance of the Special Character of the school. (Part 33 Education Act 1989) If they choose to use an alternative review system, approved by the Bishop, for their school and/or hostel, they are invited to provide a copy of their report to the Bishop, and to NZCEO.

3. NZCEO STAFF

- 3.1. NZCEO office personnel, in consultation with the Shareholding Proprietors and diocese-employed reviewers:
 - ❖ Work with diocesan reviewers to develop and monitor structures and processes to enable the review system to deliver superior outcomes for students and to assure Shareholding Proprietors that their school’s Catholic Special Character is authentic.
 - ❖ Organise twice yearly meetings for reviewers to facilitate moderation processes and common standards, and to ensure consistent national standards are met.
 - ❖ Work with reviewers to ensure that the review and development model is evaluated and kept up to date in light of experience and policy development.
 - ❖ On request, work closely with each Bishop in relation to the appointment of diocesan reviewers.
 - ❖ When requested provide support services for reviewers.
 - ❖ Act in a review appeal role, if requested to do so by a Proprietor.
 - ❖ Identify findings of national importance and pass them on to the appropriate bodies.

4. DIOCESAN EDUCATION OFFICES AND REVIEWERS

4.1. Diocesan Education Offices

- ❖ Are responsible for evaluating and/or supporting the review and development of the Special Character of each school in the diocese, and any hostels or boarding establishments, according to the agreed national policy documents.
- ❖ Appoint diocesan reviewers on behalf of the Proprietor Bishop. Reviewers will normally have recent experience in Catholic schools.
- ❖ Put appropriate systems in place to support review processes, to train newly appointed reviewers, and to ensure that school reviews are conducted according to the requirements of the national system.
- ❖ Provide guidance and assistance as appropriate to assist schools to reach acceptable standards, and to fulfil the goals for further development established during the review.
- ❖ Identify trends that have importance for the diocese.
- ❖ Ensure that if personnel from an Office have acted in a consultative role to assist a school to meet acceptable Catholic Special Character standards, another reviewer will conduct the Special Character review to determine whether or not acceptable standards have been reached.

4.2. Diocesan Reviewers

- ❖ Select a competent, senior education professional with appropriate experience to form part of the review team.
- ❖ Work with one another to support each other's work, assisting one another to ensure high standards and to achieve nationally standardised outcomes. (This is facilitated by NZCEO as noted above.)
- ❖ Attend twice yearly national moderation meetings. This will ensure standards of review are of a comparable standard nationally.
- ❖ Adhere to the Code of Ethical Conduct for Catholic Special Character Reviewers. (See Appendix 4: Documents Governing the Work of Reviewers)

5. SCHOOLS

5.1. Each school takes part in both external review and internal evaluation of Special Character.

5.2. Internal Evaluation:

- ❖ The school conducts a system of internal evaluation of Special Character, based on this review document and related to the goal(s) in the school's Charter.²⁰
- ❖ Areas for development identified in the annual internal evaluation are reflected in the next Annual Plan.
- ❖ The school may choose the manner in which it conducts its annual internal evaluation of Catholic Character, providing it covers the dimensions over a four-year cycle.

²⁰ The school charter must contain an annually updated section which also includes special character goals, and this must be in the copy of the charter sent to the Ministry of Education.

- ❖ The school makes an annual compliance declaration attesting to the Proprietor that it is meeting the specific statutory compliances associated with Catholic Special Character. The Proprietor may also require a separate annual report.

5.3. External review

- ❖ The external review enables the school to focus on its Catholic Character achievements and aspirations, with external help and feedback.
- ❖ The school prepares for the annual review by considering its achievements and goals, using the review document to focus its thinking.
- ❖ The school makes documentation available to the reviewers as requested, enables reviewers to speak to whoever they wish, and allows reviewers access to the school property for the purpose of review. Part 33 Education Act 1989), Integration Agreement clauses 6, 12 and 13, and Canon Law Can. 806).
- ❖ After the review the reviewer provides a written report to the Board of Trustees, the Proprietor, and the Bishop of the diocese (if not the Proprietor) and to NZCEO.
- ❖ Proprietor's agents provide assistance to enable the school to work on changes or developments identified in the review.
- ❖ Recommendations from the external review are reflected in the school's strategic and annual plans.

APPENDIX 4: DOCUMENTS GOVERNING THE WORK OF REVIEWERS

The documents on the following pages provide reviewers with governing guidelines.

- ❖ Code of Ethical Conduct for Catholic Special Character Reviewers
- ❖ Professional Services Catholic Special Character Review and Development
- ❖ Document of Agreement

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CODE OF ETHICAL CONDUCT FOR CATHOLIC SPECIAL CHARACTER REVIEWERS

Catholic Educational Values

Reviewers accept that their central obligation is to advance the work of Catholic schools within the overall mission of the Church, the purposes of Catholic education, and the characteristics of authentic Catholic school education defined by the Proprietors of Catholic schools in New Zealand in *The Declaration (1997)*, and *The Catholic Education of School-Age Children (NZCBC, 2014)*.

Rationale

This code specifies the high standards of performance expected of reviewers.

Core Ethical Values

Reviewers will act with

- ❖ Integrity
- ❖ Professionalism
- ❖ Impartiality
- ❖ Trustworthiness

Reviewers recognise that evaluative judgements will be

- ❖ Consistent with the evidence
- ❖ Just

Competence

Reviewers will

- ❖ Be persons recognised as having appropriate experience and competence
- ❖ Base their conclusions on substantive data and observations which can be verified as being accurate and reliable
- ❖ Prepare reports and recommendations based on the appropriate analysis of relevant and reliable data

Independence

Reviewers have a duty to

- ❖ Apply independent consideration and judgement to their work at all times
- ❖ Avoid any conflict of interest
- ❖ Prepare reports that are open, direct and honest
- ❖ Ensure that they do not knowingly prepare or certify as true any statement which is false, incorrect or misleading
- ❖ Remain impartial when undertaking reviews and interpret and present evidence fairly
- ❖ Recognise and communicate any professional limitations or other constraints they have, which would preclude responsible judgement and successful performance of reviews

Process of Review

Reviewers

- ❖ Work to establish a positive atmosphere, based on mutual respect and trust, and a common purpose based on Catholic educational values
- ❖ Are entitled to receive such information as they consider necessary for the purpose of the review
- ❖ Receive information on the basis that it will be used without prejudice and only for the purpose of review
- ❖ Respect the confidentiality of information acquired in the course of their duties
- ❖ Ensure that the disclosure of any such information is handled lawfully
- ❖ Have a responsibility to respect the powers given to them as reviewers, and to ensure they do not violate the integrity of anyone they work with

NZCEO
October 2015

PROFESSIONAL SERVICES

CATHOLIC SPECIAL CHARACTER REVIEW FOR DEVELOPMENT

- 1. Role**
 - 1.1. External Reviewer for Catholic Special Character Reviews
- 2. Reporting and Functional Relationships with**
 - 2.1. Proprietor of the school (if a Proprietor Trust Board, the Religious Order as well)
 - 2.2. Diocesan Bishop and Diocesan Catholic Education Office
 - 2.3. NZCEO Review Co-ordinator
 - 2.4. Board of Trustees of the school reviewed
- 3. Key Responsibilities**
 - 3.1. Conduct of reviews
 - 3.2. Preparation of review reports
 - 3.3. Adherence to the Code of Conduct for Reviewers
- 4. Specific Tasks and Duties**
 - 4.1. Attend training sessions for diocesan reviewers, which will include the review model, the programme outline, and project management requirements
 - 4.2. Make preliminary contact with schools, to ensure they are able to prepare for the review, and understand what the reviewers will require. Negotiate details of the visit in advance, to work in with the school as far as possible
 - 4.3. As specified in the review brief, before and during the school visit, read the material provided by the school, hold discussions with the Principal, DRS, other staff as appropriate, students as appropriate, in order to collect sufficient information for the purposes of the review
 - 4.4. Inform and dialogue with the diocesan office if any serious problems arise in carrying out the review programme
 - 4.5. Prepare written review reports, sending draft reviews to the Principal and Board, then final confirmed reviews to those specified under 2.0 above, to meet specified deadlines (note, however, that diocesan offices are usually responsible for forwarding final reviews to those listed in 2.0)
 - 4.6. Maintain records as required for the proper management of the review programme.

DOCUMENT OF AGREEMENT

Between

The Reviewer _____ (Name)

And

The Education Office of the diocese of _____

Professional services as a reviewer will be provided as in written brief attached.

Travel and Incidental Expense Payments will be made on receipt of invoices.

Contract Terms

Reviewers are expected to abide by the Code of Ethical Conduct for Reviewers, and in particular, must agree not to disclose or allow to be disclosed any confidential information.

Copyright in all materials provided belongs to the New Zealand Catholic Education Office. Materials provided may be freely photocopied (or electronically circulated) for the purposes of the review, provided they are not altered.

I accepted the terms of the above agreement:

Signed: _____ Date: _____

(The Reviewer)

APPENDIX 5: GLOSSARY

Catholic Character or Catholic Special Character: is used in this document, to stress the identity of all Catholic integrated schools.

(A school may also refer to its own particular Catholic Special Character, which is developed from its own traditions, from the charism of its patron Saint, or from the Order which founded it. The particular tradition of a school may be referred to in its Integration Agreement, as a further description of its Catholic Special Character.)

Special Character: is used in reference to Part 33 Education Act 1989 (formerly the PSCI Act).

Catholic Curriculum: all that happens within the context of the daily life of the Catholic school.

Charism: a gift or grace given by the Holy Spirit to an individual or a group for the good of the community and to carry out the Mission of Jesus. (1 Cor 12:1-14). “A burning fire” in the heart of a founder or foundress (of a school or community) which inspires others.

Evangelisation: bringing the Good News of Jesus Christ to others, and through its effects, transforming and renewing society. (NZCBC website)

Parishes and Eucharistic Communities: (From Bishop Peter Cullinane’s August 1997 Paper, *The Future Staffing of our Parishes*) The parish is a Eucharistic community. Where parishes are merged, there will, in some areas, be Eucharistic communities within parishes. These communities take responsibility for their liturgical, evangelising, catechising and apostolic activities. There can be several distinct Eucharistic communities within the unity of one parish. Marae communities are comparable to Eucharistic communities. Their priest chaplains (previously Māori missionaries) have the same faculties as parish priests, but pastorally their work is to be seen as a specialised ministry within the parish. Ethnic communities (chaplain, leaders, community) need also to be considered.

Pastoral Care: With Christ the Good Shepherd as its model, the school community nurtures, supports and cares for individuals. Pastoral care, therefore, is an integral expression of the religious dimension of the life of a Catholic school; it is love expressed in a tangible, practical manner.

Proprietors: The owners of schools. All Catholic primary schools and a number of Catholic secondary schools are owned by the Diocesan Bishop. Some Catholic secondary schools are owned by Trust Boards or companies set up by the Religious Congregations that originally established the schools. Proprietors have rights defined in Part 33 Education Act 1989 (formerly the PSCI Act).

Restorative Practice: A response to an issue/incidents that focuses on restoring the losses suffered by victims, holding offenders accountable for the harm they have caused, and building peace within communities.