

## Sabbatical Research Project 2019

### A Privileged Opportunity - Lessons Learnt as a Foundation Principal of a Complex Urban Primary School.

*By Veena Vohra  
Foundation Principal Mission Heights Primary  
2007-Current*

#### SECTION 1:

##### **Background of own experiences:**

I am Veena Vohra, currently the foundation Principal of Mission Heights Primary School. I was appointed to this position in August 2007, nearly eighteen months before the opening of the school. I have been working in education for the past 36 years, nearly 30 of these have been in schools across various parts of New Zealand. Prior to being appointed at Mission Heights Primary School, I worked as foundation staff and Curriculum Dean at Point View School when it opened in 1997 until my secondment to Unitec, first as Lecturer in Science and Technology in 1999 for teacher education from 2000, as the Programme Director for the Graduate Diploma in Teaching (primary) at Unitec's School of Education for five years. I returned to Point View School as Deputy Principal in July 2005 until my appointment in 2007 as foundation Principal of Mission Heights Primary.

As an educational leader and an immigrant teacher, I have had the unique experience of working and studying in two distinct educational systems and schooling environments. My experience in the New Zealand education sector has involved exposure to versatile roles and responsibilities in both New Zealand primary schools and in the tertiary sector. My responsibilities have included programme development, management, networking with the educational community, and programme leadership alongside relevant and ongoing academic pursuits and research from Dunedin College of Education and the University of Auckland.

As an innovative educator who believes in working collaboratively with the wider school and educational community, I believe that the Mission Heights campus provides a unique and an exciting opportunity that was created for the first time as a collaborative model of schooling within the wider educational network of schools in the Flat Bush area. This single site dual schools campus at Jeffs Road not only allows effective and seamless transitions through to the Mission Heights Junior College for our students, but it also, enables the collaborative strategic direction, use of facilities and resources for the wider school community and students of both schools.

As a school leader of the professional community for nearly 30 years in NZ and 12 of those as Principal, I have undertaken research in a number of areas such as the retention of Beginning Teachers in New Zealand primary Schools and the professional integration of Indian immigrant teachers in primary schools, Boys engagement in learning along side personalised learning programmes for students from a young age.

However, with a keen interest in leadership challenges that Principals of new schools are confronted with particularly in Auckland due to unprecedented growth in population, I am delighted to have finally taken the opportunity to study an area of leadership that pertains to my experiences and those of others in the urban schooling context in Auckland and Hamilton as part of the first sabbatical award opportunity I received in 2019.

## **Introduction - Purpose of Sabbatical study**

My theme chosen for the study has been to encapsulate my journey as a foundation principal of a complex yet independent primary school over the last 12 years, where two independent schools were built on a large single campus. Within this setting non compliance of collaboration between the Boards and the Principals always remained a heavy risk factor before the schools were established and continues to remain even now 12 years on for the future. Much is dependent on the leadership, governance and the people involved at grass root levels of both schools on a day to day basis and not at government policy level to negate this risk timely for the smooth running of both school organisations by the two Principals.

With several new schools opening across Auckland in the coming few years and many others already in operation since 2009, my aim was to compare the journey of other foundation principals in similar situations to check their experiences, to make comparisons of some common and unique challenges that each school faced, how these were managed timely and what still remains as a risk factor after these schools became operational along with any new lessons learnt to bring back to our setting at Mission Heights Schools.

Together with everyone's recounts, the lessons learnt from a snapshot of collective experiences, the next lot of newly appointed foundation principals and Boards along with the Ministry of Education and ERO will be much more aware in advance and better prepared to understand that the establishment, foundation and early operational stages of complex urban schools are quite critical and their role in setting the scene timely and positively for the successful life of a new and young school's future journey is quite a significant one.

For my study, there was no data that principals of joint school sites could access that is NZ based around the work of a foundation principal's journey in setting up a future focused school in today's urban yet 21<sup>st</sup> century schooling environment in New Zealand. My aim is that going into the third decade of this century collating and documenting current/past foundation principals experiences will help better prepare the next generation of foundation principals about the new models of urban schools that the Ministry of Education has planned for the future. The parameters for these new models of schooling may yet be unknown but will certainly include future teaching and learning environments based on design research, NZ curriculum and its principles and values, government policy specifications for new schools builds in establishing the model of future education in New Zealand and what works well for students in these new settings.

I believe that this study will also highlight and acknowledge the experiences and perspectives of foundation Principals who then brought life to their schools through an enriched and unique curriculum, their staff's energy, expertise and innate desire to provide the best education opportunities possible and most importantly the students themselves and their voices of what worked best for them right from the grassroots level will be on record

Within our own context this study will also help the new principals appointed in future years at Mission Heights Primary School and Mission Heights Junior College about the history and the set up of the two schools, the people involved, the importance of a legal constitution that was set up prior to 2009 to govern and manage shared property, staffing and community matters along with the critical importance of trust and relationship building between the two Principals for honest conversations and solution seeking process. The aim of the legal deed set up by the establishment Board of both schools and foundation principals was to responsibly and sensitively deal with any future collaboration or

leadership conflicts timely, respectfully and effectively without compromising the interests of any one school or the learning needs of all the students.

My interviews and meetings with foundation principals from 2009 and beyond have highlighted some common trends and raised questions in large single site schools besides highlighting the unique issues faced by any one individual school on the site. These issues are varied and include where despite being on one site the property matters of one school may come under threat if the roll of one school grows at a much faster pace putting pressure on learning spaces, roll growth needs or where the property of one school is managed by the Ministry of Education while the other school could be under the Public Private Partnership (PPP) scheme unlike the Mission Heights Schools set up where property matters are centrally controlled by the Ministry of Education but managed by staff on site.

The findings from this study will also identify how Boards and Principals manage and prepare the staffing allocation, financial and property matters within the resources and parameters available to them to best overcome and or prepare for the challenges that may be ahead timely and appropriately and in some cases managed in house collaboratively.

I hope that the data collected and key trends presented in my report will firstly help the Ministry of Education to better acknowledge the challenging work of the establishment Board, their advisors and the foundation principal and staff and secondly to have a better understanding of the journey ahead for all stakeholders involved in setting up a future focused educational environment in new schools where so much is left unsaid at the start and is left in the hands of the educational leaders who take charge with their innate desire to create successful schools for their students and communities.

## **Mission Heights Schools**

### **A Campus Unique-Transforming traditional education for the 21<sup>st</sup> century with a collaborative vision – From Growing Excellence to Growing Greatness**

*Joint Schools Vision (2008) - Committed to provide innovative and constantly)evolving personalised learning to enable students to be confident, active, reflective and high-achieving independent learners.*

#### Mission Heights Schools- Two school on a single site

MHP school zone serves a very diverse multi cultural community comprising of many new immigrant families where English is not spoken as a first language. Nearly 80% of the students come from Asian and Indian backgrounds. Education is highly valued by the school's community. 95% of Mission Heights Primary students graduate to Mission Heights Junior College (Years 7-10) and many transition to Ormiston Senior College (Years 11-13) for their senior years.

Mission Heights Primary School is an independent school built on the same campus as Mission Heights Junior College. The school's site is unique in that it shares the campus site and several facilities such as the library, meeting place, administration block and fields with Mission Heights Junior College. These shared facilities for both schools necessitates collegiality between the staff and community of the two schools. All day to day and strategic property matters are handled carefully and promptly with senior leaders and the Boards of both schools. A legal collaboration deed was set up by the foundation boards of both schools to manage all shared property and infrastructure matters in 2008 which is reviewed and managed by the Boards of both schools annually to ensure it serves the

changing and ongoing needs of both schools and complies to all legal, property and health and safety legislations.

## **Mission Heights Primary School**

### **Current Vision**

*“Growing Excellence- Kia Hiranga Ake” through innovative and constantly evolving personalised learning.*

### **About Mission Heights Primary School**

Mission Heights Primary (MHP) School is a decile 8 contributing primary school which opened in February 2009 for students at Years 1-6 with a predicted peak roll of 686 students. In December 2015 the school roll reached beyond its peak roll with 750 students and the need for new learning spaces and schools in the local area became a necessity. The roll has now stabilised to be around 700 - 710 at the end of each year. The school has celebrated its 10th year anniversary in April 2019 having completed 10 years of being operational and successful as a young school.

### Flat Bush 7-Schooling Network

Mission Heights Primary School has been built as part of a wider Flat Bush strategy to eventually develop up to 8 schools serving the new Flat Bush Town Centre and the rapidly growing local community. Strong projected growth is expected to result in 8500 school age children in the Flat Bush area by 2021. With the ongoing growth and development in Flat Bush since 2011 the need for establishing additional schools in the area continues to be a priority for the MoE. As a result of growth in schooling needs a seventh new school Te Uho o te Nikau Primary School opened in February 2019. An 8th school is planned as the last of the Flatbush strategy by the MoE to manage the unprecedented population growth in this corridor of Auckland.

Currently the Flat Bush 7 community of schools work closely together and the 7 Principals' meet regularly to discuss educational issues in the local area and government policies relating to education and schools. They also collaborate for staff professional development opportunities, sharing of best practice and presenting learning showcase events for its local community and professional development on an annual basis.

## **My Pre-opening Expectations as Foundation Principal**

When I was appointed as the foundation Principal of Mission Heights Primary my thoughts and excitement centered around the privilege of starting a new school with a blank canvas, the wonderful benefits we could share as a primary school with Mission Heights Junior College. Advantages for our students learning and seamless transition across the two sectors of schooling from from Years 1-10 and the amazing opportunities that would be possible by collaborating so closely at many different levels with a secondary school.

### Benefits of Teaching and Learning

Some of the opportunities that I presupposed for our school at the time included, the sharing of staff expertise across both schools in Science, Maths and Technology along with successful pedagogy that works with co-operative and personalised learning. This also included supporting students early with their individual needs and challenges and ensuring these students were not lost in the secondary schooling system.

Another area that would be critical in our unique setting to students learning in the primary school would be senior students sharing their expertise in sports, IT, Projects and other

areas in the core learning subjects with their younger peers by visiting and spending time reading to junior students and taking groups in our flagship personalised learning Abilities, Curiosities and Essentials programme also called ACE. MHJC's students input as senior role models to our male students and enrichment of learning across both schools would certainly be a great showcase of how two cross sector schools could work positively and collaboratively to support students learning and the unique opportunities that they would have as learners and leaders.

Some of these enriched learning opportunities would include students across both schools working not only in our shared facilities but also primary school students learning and working alongside their senior counterparts in a secondary school's specialist environment be it science, visual arts, technology or physical education and sports and national/international competitions.

#### *Advantages of collaborative professional learning and growth*

The two schools on a common site also offered unique professional development and learning opportunities where the synergy of school leaders and staff working cross sector would bounce each others practices, challenge traditional structures and pedagogies to ensure both schools' common vision of providing an innovative, constantly evolving learning remained true to the Mission Heights model of being built as future focused 21<sup>st</sup> century schools. This would also ensure that both schools focused aggressively and collaboratively as a whole staff on new learning that was fit for our purpose for our schools vision, globally connected curriculum and modern environment where thinking digital would be the norm.

#### *Benefits for smarter administration*

A key benefit to both schools in administration was the purchasing power of resources and staff expertise in areas beyond teaching. One such area was the schools joint ICT infrastructure where specialists from the industry could be employed, financial manager and a librarian could also be employed much earlier than the staffing FTE would allow for both schools. These administration benefits would be possible due to the sharing of costs for property matters and salaries based on the school's peak role of 60/40 (MHJC/MHP) benefitted both schools too.

#### *Benefits to community*

The spirit of collaboration between the two schools ensured involvement of the school's globally connected and new community over a period of 10 years. Smooth transition for students and families from MHP to MHJC was a key factor as it is a period of stress and trauma for Year 6s to enter a secondary schooling environment and for their families too.

Another benefit for families would be with transporting of children from home to school. Students from MHJC walk with their siblings and peers together and safely as the schools shared a common drop off area and common start and end of day times. Children from one family attending both schools would also benefit with less transport dilemmas.

An area that would be greatly strengthened would be the branding of our two schools, our common vision, policies and school systems. The familiarity and commitment by the community many of whom were new migrants about what the schools were about ensured families were well aware of timetables, NZ curriculum and its implementation and use of digital technologies in modern learning environments across both schools.

## Post Opening Reality- 2009

### Mitigating risk

The establishment Boards of Mission Heights Schools were very farsighted during the early stages when both schools were being built and realised that there would certainly be a lot of issues that could cause risk to the future of both schools. Hence late in 2008 the joint Boards and foundation Principals worked with a legal advisory firm to set up a constitution for the smooth governance and management of both schools before they became operational. Areas that could cause risk were discussed at length and identified as priority for all governance matters along with a fair measure to mitigate any conflict timely without compromising the interest any one school or their working relationship with each other.

In retrospect setting up the legal deed was a very expensive yet a wise decision by the establishment Boards of both schools. Since 2009 the review of the collaboration document is a critical task of each Board's ongoing annual planning and policy review to ensure changing needs are taken into account. To date 10 years on this document is a very handy reference point as issues to do with property maintenance and planning and sourcing whenever there is some conflict be it minor or major for a constructive solution.

The challenges we face continue to be inextricably linked in a range of areas. Despite 10 years on there is a lack of ability to act autonomously for each school as it causes unnecessary conflict and tensions between the schools management team for e.g. property as the outcomes have an impact on both schools. One major area is budgeting for the maintenance of joint fields, drive ways, shared buildings, markings, signage and landscaping where the primary school has to pay more than the stipulated 40% in the deed. Ten years on the maintenance costs have increased for each school too. This also means that the primary school has to put aside a larger than usual budget for maintenance costs and unknowns than a stand alone school or where property is managed by the terms of PPP and deducted at source.

### Implementing the school's vision for teaching and learning

Over the years the challenges that Mission Heights Primary School has faced include changing views of one school's future direction and sometimes the original vision's interpretation and implementation by each school. Some such examples are the six step learning framework, the personalised learning programme (ACE), school timings, timetable constraints with separate morning teas which have caused some segregation and mixing and mingling of staff. Another issue where confusion does arise is with the branding of the schools independent image while at the same time being seen as one large school by the community in general.

The sharing of expertise between both schools has not been possible and nor has the occasional use of a MHJC specialist space as envisioned other than the MHJC theatre for our annual prize giving events in the past and use of their learning space one year for a term when the primary school had a large roll burst. The whanau model of the Junior College has been one of the main reasons that has made their spaces unavailable to the primary school due to their own timetabling and curriculum implementation constraints.

With minimal opportunities for interaction between the school's staff due to different break times shared opportunities for teaching and learning, collaborative discussions, joint professional forums and general catchups momentum has been lost after the first year of being open.

### Co-ordinating timetables- use of fields, library, hall areas , IT and shared personnel

As the schools have grown the use of fields and shared spaces can sometimes dominate one school's needs over the other's and these can also happen at short notice with inschool/interschool events which causes some strife to both schools staff as it is hard to have two separate school events in one area e.g. sports. Hence co-ordinating timetables early with no last minute changes is the best option but is not possible always despite the best intentions to communicate between the senior leaders across each schools.

Some end of year clashes of graduation and prize giving events were so fraught with tension with needs of both schools peaking at the same time and last minute cancellations or change to annual events that they have resulted in the primary school now using its own restricted hall space. The Board funded a fresco type shelter outside the hall as a canopy for all school practices, special events, assemblies and functions. The use of the shared foyer space also creates its own issues occasionally when assemblies and programmes are happening simultaneously for both schools and noise travels. As a result annual calendars are shared for Term 4 at the start of each year to avoid doubling up of both our premises and this has eased the anxiety for parents with children in both schools

Shared ICT infrastructure and high demands on individual school's needs at certain times during the year e.g. start up and end of year or problem shooting with IT personnel in high demand again is an area of frustration faced by admin staff and teachers too as they all genuinely need their support at that time. Timetable, BYOD and orientation changes made to the MHJC calendar have been a huge factor in easing this pressure as well as the changing hardware technologies in use now on the IT team.

However job descriptions of the IT personnel have changed over the years and there are more demands on them with timetabling and personalised learning programmes delivery each term (DEEP, ACE). However with changing ICT strategies the workload is managed better by the ICT personnel for the two schools but at peak times collaborating and high demands from each school can be frustrating for them as well as the schools . These issues are always being reviewed and systems continue to be refined but it is a work in progress that we try to find a collaborative and workable solution be it trouble shooting or strategic development and new initiatives on the digital forefront.

Ongoing day to day issues continue on many platforms for two large and very busy schools and formal forums of meetings do not always suffice to manage these timely. While weekly formal meetings have been set up for open communication and strategic issues related to policy, educational issues currently impacting schools areas for professional conversations can sometimes be lost. The forum for informal catch ups and discussions has been lost due to the time constraints on leaders and their own portfolio responsibilities.

In the early years the sharing of financial costs and receipt and payment of invoices was another area that created problems. This was more apparent when there was one finance person managing the accounts of both schools and the complexities of invoicing each school timely. Sometimes there were double ups of payment or late/overdue payments and the split of 60/40 on joint invoices created tensions. Eight years on with a stable and independent finance person for each school and an external provider managing the shared invoices the confusion of double payments, late payments or non-payments has cleared up to a large extent and much is dependent on the positive collaborative relationships between the two finance managers of each school on a daily basis.

### Shared/common Board members

Having some common board members is a positive on one hand but also can create complexity in decision making relating to property matters, clashes that occur in the usage of shared spaces for special events, policies, financial ratios arrangements or staff appointments. While the schools are independent of each other and governance decisions by the Board need to be autonomous, it can raise tensions sometimes where confidentiality and compromising of one schools needs over the others could create undesirable discussions and or biased decision making.

The community also faces confusion with one school not taking out of zone students while the other has been enrolling out of students despite clear communication by both schools on their websites and enrollment documentation. Parents of MHP have always assumed that the pathway for their children from MHP is to attend MHJC at the time of enrolling at the primary school even if they move out of zone after a few years at our school. With 95% of our students going to MHJC, these parents sometimes feel on the outside as they genuinely feel that once they have enrolled at MHP their child/ren will go to MHJC and complete their Year 10 on the joint campus despite the communication sent repeatedly by each school regarding their zones.

Other areas that created tensions in the past for our schools have included cross school staff applications and protecting the privacy of applicants vs open communication/transparency and the spirit of collaboration philosophy where one principal has to protect the confidentiality and possible appointment of applicants on their individual merit basis for the advertised position. Unnecessary escalation of tension and dilemmas of this kind relating to the appointment process which should be discreet to each school and its appointment protocols can be easily compromised. Any negative interactions within this context and the national problem of staff shortages between the two school leaders could easily destroy the trust and relationship built over time. To turn around and work amicably and sensitively again and restoration of trust amongst the parties involved could be a long process. We are fortunate at Mission Heights Schools to work these differences out timely and in the spirit of collaboration between us when they occur but do know the need for sensitivity that each Principal needs to be mindful of at all times.

### Ministry of Education

Over the years the relationships with the MoE and its people with Mission Heights Primary has been very productive and positive all along on all fronts. However the Ministry's personnel involved with our schools be it the senior advisors or property personnel particularly when change of staff happens in too need to be better informed about the concept on which the Mission Heights Schools were established and the complexities of two independent schools being on one site for shared school matters which are different to other new schools opened since 2009.

Information does not seem to have been passed on in some cases. Property advisors and senior staff need to have a data base on the set up of these schools and how the shared property spaces are managed. I have had to repeatedly explain over the years to each new property advisor how the schools have been set up, the collaboration deed for property management and the independent yet the interdependent model of Mission Heights Schools even in 2019- ten years on since both the schools opened. Only towards the end of last year when the 10YPP planning came up for both schools that we have had a dedicated property advisor with has the information

An area where lack of information by the Property Division of the Ministry became very apparent was when the 10YPP timeline and funding allocation was being discussed late



last year with a new Property advisor allocated to our schools. Roll growth and need for additional learning spaces on the site was another area that the Ministry had to understand the sensitivity of collaboration and communication between the two schools when temporary classrooms had to be provided for our school and where they were to be located on the joint site. The Board of MHP had to intervene on the Ministry's and MHP's behalf to diffuse the tension between the Ministry's lack of communication to MHJC. We all worked together to solve the issue amicably and promptly.

We are very pleased that our current property advisor from the MoE who came on board in 2018 is well aware of the nature of our complex site, its set up, the collaboration deed for all property matters and has worked on our 10YPP jointly and constructively this year to understand our unique set up at Mission Heights.

### Education Review Office

The review office teams that have visited Mission Heights Schools over the years also lack some information about Mission Heights Schools unique set up. An understanding of the schools common vision for teaching and learning, transition, curriculum enrichment, policies along side the individual yet collaborative efforts we put in have not been looked at as one unique set up and each school repeats these common aspects to their individual ERO teams every visit. Hence an opportunity has been lost by ERO to highlight the longitudinal student learning outcomes, achievement and progress on this unique site as 95% of MHP students move to MHJC through one joint schools visit. It would be helpful if the past process is somewhat refined by ERO to cement positive relations further that are centered around curriculum and the value added to student learning starting at MHP and graduating from MHJC.

If both schools worked and planned collaboratively for ERO's site visit with just one team it would also be useful for both schools regarding the successful transition of students, their learning progress, followup on Maori and Pasifika students and teachers professional learning and development programmes across schools that have a common school vision. As the schools have common policies and procedures along with health and safety requirements this would be another area that could also be audited jointly at the same time.

A joint education review and feedback from ERO as an independent body to the both the Boards, Principals would encourage collaboration, open communication, trust in each others professional mileage with student learning at many layers of management and governance responsibilities and overall schools performance and teachers professional learning programmes at our Mission Heights Campus. This includes day to day, long term and strategic future planning for both schools. Such a review would improve relations and tensions from both ends of the spectrum for all stakeholders and make the schools truly seamless and consistent in its mission of going from Growing excellence to Growing Greatness as a successful educational entity which was originally envisaged where students remain at the heart of everything we do jointly.

## **SECTION 2:**

### **Methodology**

Nine school Principals were interviewed in this study. Seven of these were foundation principals while two principals had taken over from foundation principals. The schools were situated between Hamilton and North Shore.

The nature of the physical layout of the complex urban schools, were as follows;

- *Set up on one site yet independent /interdependent*
- *two schools with some shared facilities on a common site*
- *set up as one school however built on separate sites*
- *stand alone schools but as one large urban learning complex*
- *independent school*

Interviews were set up formally with each principal and these lasted from a minimum of 60 minutes to a maximum of 90 minutes.

Of all the personnel interviewed, it has been most difficult for me to make contact with the Ministry's new school's division to gain their views about their future plans and forecast of the number of new schools being built in the next few years and what kind of a physical set up or philosophy they are being established on as well as information for all establishment and foundation personnel involved.

**The following questionnaire was used for each interview to collect the information for my study;**

**1. What are your views about the advantages of being on a single campus with two schools that are independent of each other?**

- Pre-opening
- Post opening

**2. What are your views about the challenges you faced/face in being on a single site as two separately managed and independent schools?**

- Pre-opening
- Post opening

**3. How would you and your Board mitigate any future risks for your school?**

- Areas of risks for your school
- examples of overcoming/being prepared in advance

**4. If you had a chance to reinvent the wheel how would you go about it now that you have had first hand experience as a foundation Principal?**

- Things you would change
- Areas you would strengthen

**5. Are there any other comments you would like to make or add from your experiences/lessons learnt:**

- **For future foundation Principals and Establishment Boards of Trustees of new urban complex schools?**
- **To the Ministry of Education**, New schools division, Resourcing/funding and Property Advisors
- **To the Education Review Office**

**SECTION 3:**

**Collated Findings**

**Principals Perspectives:** Two broad and overall aspects of categories were used to determine and categorise findings from the Principals comments

- what principals were most concerned about
- what principals found desirable in a complex urban school setting

## **Principals**

- Two principals believed they would be sharing the same site, however this did not happen. Neither were pleased when this did not happen as they preferred to be on same site for better transition of their students.
- Two principals were given the understanding that they would be given overall authority (executive principal) of the complex school site. However this did not happen and they subsequently resigned.
- One school that did not have a common site with the secondary school, the principal wished the two schools were on a single site with one Board of Trustees for better transition. The principal felt it would have reduced attrition at the end of year 8 for their school which would not have been seen as an intermediate school by the community.
- Growth of one school vs the other was a risk factor for funding as well as an advantage in the early years in areas such as sharing of underused staffing, use of empty learning spaces in one school by the fast roll growth rate in one school on one hand as well as jointly procuring additional school resources such as vans, computers, chrome books, specialist staffing etc. where relationships and trust was at a high level.
- Wherever two schools were on a common site there was a shared vision and values that bound the two schools. However, one school where the middle school years were with primary they sought more benefit for them to be aligned with the vision of the senior school than with the primary as this was where their students were headed.
- Where the schools shared the same site the transition process from one school to the other was very smooth and advantageous for those students and their families. Principals of both the schools on the site felt that these students transitioned better and fitted in with the culture of the next school due to the familiarity of the campus, learning philosophy and older cousins and siblings attending the same campus despite attending the other school which was either a primary or a Junior high school.
- Secondary principals saw the advantages of primary school learning pedagogy but chose the pathway to senior high schools as this was seen as more of an advantage to their students pathway to university, polytechnics and beyond.
- Other than two schools, that had formalised weekly meetings, none of the principals of any of the other schools had formal meetings but certainly met once a term and/or adhoc when needed. These principals with random meetings had better relationships without the formal meetings and did not see the need to setup pre-scheduled meetings, weekly or otherwise for the year in comparison to the others. The only formal meeting was with the Board Chair and the two principals as a triad before a Board meeting.

- Most dealings between the two schools were principal to principal and not through or with other senior leaders. These principals had built strong relationships and trust with each other which in turn worked better for communication and collaborative relationship building with staff of both schools as a follow on.
- Specialist staff employed by secondary schools took specialist sessions in the other school as and when their timetable allowed. There was a high level of collegiality between both schools staff and students where this happened and all stakeholders benefited by it as it was also visual and productive for transitions and learning.
- Only two junior high school principals had knowledge of the primary school curriculum as they had been primary school principals previously.
- Of the ten schools, three were first time principals.
- All principals agreed that a change of principal was a risk factor in rebuilding relationships to a positive level with the new leader and highlighted that it would take time and effort on all sides particularly in rebuilding collaborative relationships and trust to a functional level. It was like starting from scratch again they felt especially with changing the mindset of the newcomer to see the bigger picture of two schools as one successful learning organisation. This was an aspect which most felt would cause much strife as it required openness and letting go of previous experiences, notions and mindsets before the joint gains and needs for all students learning could be seen as a joint priority.
- Secondary schools had a different style of teaching, assessments, formal exams to those of primary and intermediate year levels which caused some misunderstanding in the community about traditional vs modern innovative teaching methods/ learning environments and hence principals of junior high schools felt that this was one reason that the families chose to shift their children to secondary schools early as they felt admission was easier at Year 9 and for their child's future success at University. Attrition at Year 9 for the Junior highs.
- All junior high schools opted for PPTA contracts for their staff to better manage classroom release time and staff relationships. However, their funding grants were still at primary level for the year 7 & 8's in some cases.
- The principal of the independent school that had no other school on site, spent more time on teaching and learning, innovation and curriculum support time during pre-opening. They could build and embed the philosophy of the school without underlying tensions that schools on joint site were working with and had to manage. This principal also had better relations with the junior high school principal and met on a termly basis as a learning community along with other principals of contributing primary schools.
- The principal of the school built first on a site, had to work harder with the other school that was built later to work collaboratively. In one case there was a relationship breakdown between the two principals and the division has been a very unpleasant experience for this Principal, its Board and staff.

## **Board of Trustees**

- The schools that had one board worked out well for smooth governance purposes and there was no conflict and needs of both schools were adhered to.
- Having one joint Chairperson and both principals working together with transparency of prioritising the needs of one school over the other if the need arose was a common feature where there was a common Board.
- Those schools with common boards, found the board chair and members to be impartial managing governance matters and their Boards in turn had great management and governance understandings.
- Four schools that did not have joint boards were content to have their own independent Board so that their schools interests always remained a priority.
- Where there were some common trustees on two schools boards, there were issues of confidentiality and compromising of one school's interests over the other in matters relating to property, policies and inschool matters.
- Where finances were managed jointly – a common business manager was employed as a shared employee. The business manager handled all finance, payroll, relief teaching and fees keeping in mind the operational funding and budget constraints for each school. Invoicing was handled by the Business Manager and no issues were reported by these principals who had good communication with each other and could scrutinise or query any financial matter relating to their school transparently. There were no external financial services used for monthly reporting other than the annual audit. Having one business manager provided financial gain to both schools and continued daily access on site to both principals instead of adding a layer of an external accountant.
- Where there was a single Board, while the operational funding was managed individually and monthly finance reports were presented at Board meetings, capital surplus of each school was combined to prioritise the needs of either school as and when required. The capital surplus was made transparent to both principals which meant they were independent yet interdependent with financial management and spending. None of these schools has issues with auditors understanding the complexities of their joint financial management processes.
- Funding and resourcing had to be managed sensitively where primary and secondary finances were managed by one board due to disparity of primary & secondary school operational funding grants. Where Boards were separate, a common finance manager was problematic due to unexpected and untimely invoicing, payments to providers and delay in shared staff transfer of salaries, or the the business manager's salary arrangements by the two schools.

## **Property**

- Nearly all principals were dissatisfied with some aspect of their property design and functionality. They felt there was no support from property advisors in the new schools division for any changes to fit the pedagogy of teaching and learning in a modern learning environment and the recent digital curriculum's technology requirements. Most had to make the changes from their own funds after the schools opened.

- In all but two cases, the building design was completed and confirmed before the principal was appointed which these principals did not like. They highlighted changes that needed to be done even before the school opened or just after from an educational perspective which either could not be done or the change would cost a lot of money from their schools own funding so much earlier than they had anticipated.
- Property challenge was also noted where one school is managed by the MoE and the other on the same site is managed by PPP. In one instance it increased the principal's work load, whilst in the other – lessened it as it was outsourced.
- One primary school that has no hall/gym has to pay for the use of the senior school's gym/hall, while another primary school did not get access to any of the secondary schools facilities due to their own heavy use for their students. The stand alone primary school principal had no issues as they were totally independent. However all Primary school hall spaces were seen as inadequate or limiting for their peak roll right from the start build.

## **Resourcing**

- There was a communication gap between the school and resource providers e.g Down the Back of the Chair. Schools were unable to procure a full compliment of resources easily – only two years of books/limited curriculum documents and only several copies of each reader were sent out and this was not sufficient to get the teaching programmes underway from day one.
- Education providers did not cater for new schools requirements as they did not recognise them without students. This was hugely problematic for new schools as they had to request for amnesty from other schools to get resources such as school journals.

## **MoE/ERO**

- The Ministry was not effective or helpful in the concept and management of two schools on one site.
- All principals felt that running the school is a complex task at anytime let alone on the same site which is not recognised by the MoE or understood by the team of the stress that principals of these schools face.
- In recent years some schools had an ERO team who were aware of the new school model, personalised learning and complexities and innovative curriculum where it was headed by the same lead person. However, the other schools not headed by this person had a traditional review as ERO's understanding of new schools were limited eg MLEs/ILEs and their innovative curriculum.
- An ERO team that looked at both schools overall joint performance of systems, curriculum delivery, student learning outcomes and staff professional learning well before they opened would have cemented a collaborative relationship from concept stage for both schools and paved the way for a collaborative stake of education for all future students and the community on the joint site.

- Most principals found that the MoE left many things to chance or unsaid. As a result principals and boards of these complex schools had to manage the challenges that were unbeknown to them at the time and the only reason things had worked so far or they faced them well was their own resourcefulness, resilience and support from their boards and key staff.
- Recently, the Ministry has provided more lead in time for primary schools to appoint staff which has eased pressure on the principal. In the past this only happened in secondary schools.
- Ministry personnel had no understanding of the support that principals could require and no specific PD was provided other than what the principals themselves organised, scoped and was funded by the Board in new schools. However the principal of one Waikato school stated that he was well supported by the Ministry advisors at all stages prior to opening as he knew them from his previous position.

## **SECTION 4:**

### **Recommendations**

- The MoE needs to give all foundation Principals and Boards of complex urban schools clear information and transparency of any of it's future plans for the school to reduce future conflict/risk.
- The MoE needs to recognise the long hours of work that foundation principals of complex schools have to do well before the schools open and the stress that it causes them both is much more than a new stand alone school's principal.
- Where there is one board for both schools, it is recommended that there is a common business manager and financial management as this makes it easier to manage day to day, monthly and strategic financial planning that is beneficial to both schools needs. Foundation Principals need to be briefed about the benefits of such arrangements very early in their appointment.
- Having one Board makes it easier for staffing management, in cases where one school has surplus while the other has unprecedented growth in the early years. Willingness to work flexibly is the key to building the successful relationship so that when the bulge moves to the other school such arrangements can be reciprocal if needed.
- Property management is easier where both schools are managed under one umbrella either PPP or the MoE. It should be common across both schools. This helps to reduce the load, conflict between school leaders and the property team.
- The Ministry needs a better understanding of the complexities of managing complex urban schools in the context of innovative curriculum implementation and learning other than just the physical set up of a modern/independent learning spaces. This may require a specialised team by the MoE that have visited overseas schools etc. and understanding and practicalities of how teaching and learning occurs within these new schools.

- Relationships between the two schools work better and much more amicably in an informal, open adhoc communication than formalised timetabled meetings. These have to begin with the Principals and then disseminated with a genuine effort to the rest of the staff.
- It is recommended that all schools have their own IT specialist so there is no compromise by having a shared employee as 21<sup>st</sup> century schools rely heavily on the use of digital technologies whether primary or secondary with an understanding to work collaboratively when needed and also to manage peak time workloads collaboratively.
- ERO should have a specialised team for all new schools, that are aware of what 21<sup>st</sup> century learning, MLEs, ILEs mean. This helps with their understanding of the schools curriculum, systems and policies before they open. They should see the complex urban school set up as one entity when assessing and evaluating two schools on a single site.
- Junior high schools facing attrition at year 9 level is due to the community still preferring traditional methods of secondary school education. It is recommended that early education and information to the community is provided timely and is ongoing as there is a huge gap between what the school thinks and the community understands and wants for their child.
- There needs to be more community education by secondary schools of how they incorporate the philosophy of the junior high schools innovative curriculum into their own programmes for smoother transition of students and families.
- The Moe need to be aware of the pressure on shared facilities once schools open and grow too quickly. This can cause conflict between the two schools. It is recommended that schools have their own staffroom, admin areas, hall, specialist spaces from the beginning.
- To avoid future risk, where the change of leadership occurs, both schools Principals and Board Chair/s must build their trust and open communication well before the newly appointed leader commences in their role to avoid third party conflict and any fracturing of a well established collaborative protocols and systems.
- Where there are shared facilities, it is recommended that a collaboration deed is put in place for future proofing of property management. The deed needs to be reviewed bi-annually within the parameters of the original startup of the schools by both Boards, Principals and the MoE's Senior Property advisor to ensure MoE is aware for their own records of each school's property management and funding requirements.

## **In Conclusion**

This short research project as part of my sabbatical has been very rewarding and enriching in the various ways that the new urban complex schools have been set up, managed and are operational since the concept of Mission Heights Schools in 2007. The hard work and determination of the principals to make their schools succeed cannot be underestimated as it has been a phenomenal aspect of their professional commitment,



enthusiasm and inspiration as school leaders. Such a topic can easily turn into a much more detailed PHD research as stated by a few Principals to me.

There have been lessons learnt from my own and the journey of these principals both positive as well as those that cause us with daily dilemmas and tensions. They include the challenges we as Principals face on a day to day basis even well after opening and how these are overcome to ensure that our schools are being managed successfully to improve student outcomes and for each of our schools to deliver a cutting edge, innovative curriculum that is personalised and unique within the New Zealand context. I wish to acknowledge and thank each and everyone of the nine Principals for their time and honesty despite their busy schedule. Without their consent to meet with me this project would not have been possible.

As foundation principal of Mission Heights Primary, I will certainly be using/taking some very useful learnings from this study into the governance and administration of complex schools to further improve our joint relationships and systems where needed so that together we can mitigate any present or future risks that could occur whenever there are changes at principal and or board level or if relating to our campus and students needs and share these with all our staff on our joint yet unique campus. It's been great to also note that many others have faced some of the challenges we do at Mission Heights and the gains made for us over the years cannot be overlooked due to the people at the grassroots level.

In concluding firstly I wish to thank my Board Chair and the Board of Mission Heights Primary for their support of me to make this research project possible and to take this time away from school for the first time in 12 years since I was appointed as foundation principal of Mission Heights Primary in 2007. It has been a rich journey of 10 weeks that came alive for me once again as each foundation principal shared their journey their experiences with me. Thanks to my Board's financial support and belief of this topic who saw this study as a worthwhile topic.

Next a huge thanks to my staff and senior leadership team who carried on with their responsibilities sincerely and wholeheartedly with the day to day business of a busy school term during my absence. As a school we are only as good as each and every member in the team who can work collaboratively yet independently as professionals.

Finally it has been a privilege to receive this prestigious TeachNZ scholarship award when there are so many new schools being built that made this project possible with the 10 week fully paid leave to refresh, research and rethink. I hope the findings from my study will be seen as well worth the knowledge gained for the new people coming on board be it the foundation Principal, Boards or the MoE and ERO teams as '***Together is a great place to be***' for future schools and all their stakeholders.

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