
Self-Review Questions for Proprietors (Warrant of Fitness)

1. How does the Proprietor use pre-integration history to help inform current Special Character perspective?
2. Post-integration the primary Proprietor role is to 'carry the vision' for the Special Character of the school. It should provide continuity of vision and ensure support, direction and accountability in this area to the Board of Trustees [BOT]. Does the Proprietor see itself this way? Why or why not?
3. Post-integration the role of the Proprietors is 'enshrined' in the Private Schools' Conditional Integration Act. Does the Proprietor have an adequate working knowledge of the Act and/or good access to assistance in this area where necessary?
4. How does the Proprietor ensure it has an adequate working understanding of how the Private Schools' Conditional Integration Act aligns and interacts with other legislation?
5. In what ways does the Proprietor maintain the Integration Agreement for its school(s) as a 'living' document(s)?
6. How does the Proprietor maintain its key documents to ensure continuity of vision and practice? In what ways does the Proprietor promote a clear understanding (including a written record) of its own governance policies and processes?
7. In addition to the school's Integration Agreement, has the Proprietor determined and recorded the basis on which it wishes to work in partnership with the Board of Trustees (and indirectly the Principal) in order to discharge effectively its obligations as Proprietor? The highest calling, if you like, of the Proprietor is to 'maintain and preserve the education with a Special Character provided by the school'. Does the Proprietor have good policy and procedures supported by excellent working relationships with BOT and Principal to discharge its responsibilities in this area?
8. How does the Proprietor ensure that the school's Charter and policy framework accurately reflects the school's Special Character?
9. In what ways does the Proprietor promote a clear understanding (including a written record) of its own governance policies and processes?
10. Property
 - Has the Proprietor worked with the BOT and others to develop a comprehensive future-proofed property master plan for the school?
 - Is this plan cost effective and sustainable relative to the level of Attendance Dues being charged?
 - Has the Proprietor worked with the BOT and others to develop a 10-year property plan which is MOE compliant?
 - Is the school property adequately insured, cost-effectively?

- Have the Proprietor and Board documented clear understandings around unintegrated space the school may occupy?
 - Are roles and responsibilities between Proprietor and Board regarding property well documented and understood
11. Does the Proprietor operate best practice financial administration in respect of:
- Collection and expenditure of Attendance Dues?
 - Collection and expenditure of Policy One funding?
 - Collection and expenditure of other forms of financial contributions (donations, other fundraising)?
- How Does the Proprietor ensure that it has clear and robust reporting and accountability mechanisms for its officers and/or staff?
- What mechanisms does the Proprietor have in place for best practice risk management strategies regarding financial management (eg. debt management strategies, investment strategies, monitoring of interest rates, pupil numbers, non-payment of Attendance Dues, etc.)
12. Where the Proprietor's school(s) enrolls international students, is there a clear understanding of how they will be treated from a Proprietor perspective?
13. Does the Proprietor have a good working understanding of its obligations to the Ministry of Education, including maintaining up-to-date site plans, up-to-date 10-year property plans, cooperating with Policy One audits, submitting Attendance Due accounts annually, etc.? Has the Proprietor individually, or working with others (APIS, AISNZ), developed a good working relationship with key people in the regional MOE office?
14. Does the Proprietor have adequate resources and understanding to submit high quality applications to the MOE from time to time as necessary (eg. maximum roll increase applications, Policy Two applications, etc.)?
15. In what ways does the Proprietor ensure Proprietor representative positions on the Board are filled with appropriate personnel who are inducted and adequately supervised in their role? Do these representatives understand their accountabilities?
16. Does the Proprietor understand and make use of the support and advice that can be provided by APIS and AISNZ?
17. In the event of a crisis which may involve the Proprietor needing to work closely with the BOT (and indirectly the Principal), what strategies do the parties have in place to work well together?