



SUNNYVALE SCHOOL POLICIES

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Reviewed Signed

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GOVERNANCE POLICY

The board is entrusted to work on behalf of the stakeholders. It emphasizes strategic leadership rather than administrative detail and ensures that it complies with legal and policy requirements. It keeps ‘enhancing student achievement’ as its focus.

BOARD ROLES AND RESPONSIBILITIES

The Sunnyvale Board of Trustees key areas of contribution are:

- Representation
- Leadership
- Accountability

BOT ACCOUNTABILITY MEASURE	STANDARD
1. Set strategic directions and long-term plans and monitor the board’s progress against them	1.1 Board meets strategic goals
2. Protect the special character of Sunnyvale School	2.1 Special character is obviously considered in board decisions
3. Monitor financial management of the school and approve the budget	3.1 Satisfactory performance of school against budget
4. Monitor and evaluate student achievement	4.1.1 Reports from principal (and/or delegated staff) on progress



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	<p>against Annual Plan highlight risk/success</p> <p>4.2 Meet targets in Annual Plan, implement Curriculum Policy and satisfactory Performance of Curriculum Education Priorities</p>
5. Effective risk management	<p>5.1 Attend board meetings having read Board papers and reports and ready to discuss them</p> <p>5.2 Board meetings have a quorum</p> <p>5.3 Remain briefed on internal/external risk environments and take action where necessary</p> <p>5.4 Identify 'trouble spots' in statements of audit and take action if necessary</p>
6. Ensure the board is compliant with its legal requirements	<p>6.1 New members have read and understood: board induction pack; & requirements of board members</p> <p>6.2 New and continuing members have kept aware of any changes in legal and reporting requirements for the organisation. Board has sought legal advice when necessary</p> <p>6.3 Accurate minutes of all board meetings, approved by the board and signed by Chair</p> <p>6.4 Individual staff/student matters are always discussed in Public Excluded Session(In committee)</p>
7. Attend board meetings and take an active role as a trustee	<p>Attendance at a minimum of 80% of meetings</p> <p>No unexplained absences at board meetings (Three or more absences result in immediate step down) Refer Education Act 1989</p> <p>Board Papers are read prior to attending board meetings</p>
8. Approve policies and major programme initiatives	Approved and minuted.
9. Fulfill the intent of the Treaty of Waitangi by valuing and reflecting New Zealand's dual cultural heritage	The Treaty of Waitangi is considered in Board decisions
10. Approve and monitor Personnel Policy and procedures. Act as a good employer	Members are aware of and familiar with relevant Employment Legislation and Collective and Individual agreements
11. Appoint and assess the performance of and nurture the Principal	Principal's Performance Management System is in place and implemented
12. Deal with disputes and conflicts referred to the board	Successful resolution of any disputes and conflicts referred
13. Represent the school in a positive appropriate manner	Code of Behaviour adhered to
14. Ensure sufficient money is budgeted to conserve and enhance the resource base	Property/resources meet the needs of the student achievement goals
15. Hand over governance to new board/trustees at election time	<p>New trustees are provided with a Governance Manual</p> <p>New trustees are fully briefed and able to</p>



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	participate following attendance at an orientation programme
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TRUSTEE'S CODE OF BEHAVIOUR

Sunnyvale BOT is committed to ethical conduct in all areas of its responsibilities and authority. Our Trustees shall:

- Maintain and understand the values and goals of the school
- Ensure the needs of all students and their achievement is paramount
- Be loyal to the school and its mission
- Publicly represent the school in a positive manner
- Respect the integrity of the principal and staff
- Observe the confidentiality of non-public information acquired in their roles as trustees and not disclose to any other persons such information
- Be diligent and attend board meetings prepared for full and appropriate participation in decision making
- Ensure that individual trustees do not act independently of the board's decisions
- Speak with one voice through its adopted policies and ensure that any disagreements with the board's stance are resolved within the board
- Recognise that only the chairperson can speak for the BOT
- Continually self-monitor their individual performance as trustees against policies and against any other current board evaluation tools
- Be available to undertake appropriate training

CHAIRPERSON'S ROLE

The chairperson of Sunnyvale BOT is the leader of the board and carries overall responsibility for the integrity of the board's processes. The role involves the following responsibilities:

CHAIR ACCOUNTABILITY MEASURE	STANDARD
1. Oversee general performance of the board	1.1 Board performs against its forms of accountability and strategic goals
2. Ensure information about the financial performance of the organisation flows to the board	2.1 Board remains well-informed about the financial performance of Sunnyvale School
3. Establish and maintain systems for information flows to the board	3.1 The board receives information on time and has time to comment and have input 3.2 The board has adequate opportunities to have input and make decisions 3.3 The Chair ensures accurate minutes are kept, approved by the board and signed by the Chair.
4. Attend and chair board meetings	4.1 Attendance at all meetings (Unless chairing responsibility has been delegated prior to the meeting) 4.2 Meeting procedures as outlined in the Standing Orders and Local Government Official Information and Meetings Act 1987 are observed except where the board has suspended them. Information on



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	meeting procedures is found in the section on meetings.
5. Make recommendations to the board about prudent management of board matters	5.1 Recommendations will be made as necessary
6. Establish and maintain an ongoing working relationship with the Principal	6.1 Regular meetings are held in addition to ongoing liaison
7. Deal with disputes and conflicts referred to the Chair	7.1 As required by the board's Policy and Procedures
8. Act as Protected Disclosure Officer	8.1 Requirement met
9. Ensure the Principal's Performance Agreement and Appraisal are completed on an annual basis	9.1 Report of Principal's Performance Appraisal is tabled at the board according to the appraisal process.

MEETING PROCESS

Sunnyvale Board of Trustees is committed to effective and efficient meetings.

Meetings:

- Are based on a prepared annual agenda. The agenda preparation is the responsibility of the chairperson. Copies of the agenda will be available on request.
- Are held with the expectation that trustees have prepared for them and will participate in all discussions at all times within the principles of acceptable behaviour
- Have the right, by resolution, to exclude the public and news media from the whole or part of the proceedings in accordance with the Meetings Act. Decisions by the board are fully recorded but remain confidential.

The board needs to:

- Make the reasons for excluding the public clear
- Reserve the right to include a non-board member

MEETING PROCEDURES

General:

- Meetings are held monthly as per the annual agenda
- The quorum shall be more than half the members of the board currently holding office
- The Chairperson shall be elected at the first meeting of the newly elected board
- The Chairperson may exercise a casting vote in the case of equality of votes, in addition to his/her deliberative vote
- Any trustees with pecuniary interest in any issue shall not take part in any debate on such issues and may be asked to leave the meeting for the duration of the debate
- Only trustees have automatic speaking rights
- The board delegates (and minutes) authority to the Deputy Principal in the times of absence of the Principal

Time of Meetings:

- All regular meetings commence at 7.30pm and conclude by 9.30pm
- Any resolution for an extension of time not exceeding half an hour may be moved
- Any business remaining on the agenda at the conclusion of the meeting is transferred to the following meeting.

Special Meetings:

- A special meeting may be called by delivery of notice to the Chairperson signed by at least one third of trustees currently holding office



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Exclusion of the Public:

- The meeting may, by resolution, exclude the public and news media from the whole or part of the proceedings in accordance with the Meetings Act

Public Participation:

- Public participation is at the discretion of the Chairperson
- Public attending the meeting may be given advice about their rights to participation in the meeting

Motions/Amendments:

- All motions and amendments moved in debate must be seconded unless moved by the Chairperson
- Motions and amendments once proposed and accepted may not be withdrawn without the consent of the meeting
- No further amendments may be accepted until the first one is disposed of
- The mover of a motion has the right of reply
- A matter already discussed may not be reintroduced at the same meeting in any guise or by way of an amendment

Termination of debate:

- All decisions are to be taken by open voting by all trustees

Suspension of Meeting Procedures:

- Standing Orders may be suspended by resolution of the meeting.

Agenda:

- The order of the Agenda may be varied by resolution at the meeting
- A typical meeting agenda may include the following:
 - Administration Matters – Present, apologies, confirmation of minutes, correspondence
 - Principal's Reports to the Board – Curriculum (Achievement), Financial, Property, Personnel, Health & Safety, Self Review, Legislation
 - General business – including items of Special Issues and Projects
 - Meeting closure – comments and preparation for the next meeting
 - Staff
 - In Committee

NOTE: items not on agenda will be tabled for the next meeting as agreed by the Board

Minutes:

- The minutes are distributed within 48 hours of the meeting.

BOARD REVIEW OF GOVERNANCE

Trustees:

Annually each trustee will evaluate their own performance to the board and their individual contribution and effectiveness, by way of confidential survey with the Chairperson. The basis of this review shall be these Governance Policies (in particular the Roles & Responsibilities standards and the Code of Behaviour). The culture of the board will allow for performance related issues to be raised in a non-judgmental manner for discussion in a non-adversarial way



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Chairperson:

The board Chair will evaluate his/her effectiveness and performance by way of survey with the individual trustees and the Principal (in particular the Role of the Chair standards).

Board:

Annually the Chairperson will coordinate a review of the effectiveness of the board of trustees. An evaluation will be provided to the board on the outcomes, including a training plan for the board as a whole. The review will be based on the strategic Plan and Policy Framework.

GOVERNANCE PROCESSES/PROCEDURES:

COMMITTEE PRINCIPLES:

The board may set up committees to help carry out its responsibilities and due process (E.g. Staff appointments, internal audit, disciplinary). Board committees:

- Are to be used sparingly to preserve the board functioning as a whole when other methods have been deemed inadequate.
- Trustees are solely responsible for decision making; non-trustee advice will be sought when required to augment the decision making process
- May not speak or act for the board except when formally given such authority for specific and time-limited purposes. Such authority will be carefully stated in order not to conflict with authority delegated to the Principal.
- Help the board (not the administration) do its work.
- Assist the board chiefly by preparing policy alternatives and implications for board deliberation. Board committees are not to be created by the board to advise staff.
- Are to have terms of reference drawn up as required. These will contain information about the following:
 - Purpose
 - Committee Members
 - Duties and Responsibilities
 - Reporting procedures/schedule
 - Budget

“Education Act 1989, section 66

- *gives the Board the authority to delegate any of its powers to a special committee of trustees except the power to borrow money.”*

The Board will spell out in its minutes the precise powers that are delegated to a committee of trustees whether the number on that committee is one or several. In addition the same delegation motion will name the members or how it will be constituted and it will also be clear as to how far the committee can go. For example, the committee can

- (a) Investigate and report their findings to the Board.
- (b) Investigate and make any recommendations based on those findings to the Board.
- (c) Investigate, come to conclusions based on what they have discovered and have the power to act upon those conclusions then report to the Board what they did.



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- The student disciplinary committee will always be given delegation (c)
- The delegation to the personnel/appointments committee will be discussed and decided on each occasion.

“Education Act 1989, Section 66A

- *is about delegating power to staff members. Useful for one offs when the Board wants the principal or the DP/AP (with agreement of the principal) to perform a specific task.”*

PRINCIPAL’S PERFORMANCE APPRAISAL

Sunnyvale Board of Trustees will ensure that we:-

- (a) Lead the annual process
 - (b) Choose, agree and document the plan
 - (c) Include the Principal Professional Standards
 - (d) Align with core purpose/core values/strategic and annual goals
 - (e) Receive a report on the findings of the appraisal
- The Appraisal Committee (which will include the Chairperson and/or one other BOT member) and the Principal will consult to determine the process for the Principal’s appraisal. The second Board Member (if required) will be chosen at the discretion of the Principal. The review process will evaluate the performance of the Principal against a number of key indicator points. The process will be recorded in a performance agreement and implemented annually.
 - In considering the process and the key indicator points which will be used due regard must be given to; the Professional Standards (see attached)
 - The Principal’s management/leadership role and associated tasks and meeting the requirements of National Administration Guidelines:
 - curriculum and student learning (NAG 1)
 - student activities and welfare (NAG 5)
 - administration (NAG 6)
 - personnel (NAG 3)
 - property (NAG 3)
 - finances (NAG 3)
 - community liaison
 - planning and self-review (NAG 4)
 - advice to the board
 - strategic planning
 - promoting the school
 - teaching
 - An appropriate professional will be engaged to appraise the Principal’s responsibilities.
 - An appraisal report will be prepared. This report will recommend any remedial measures which are required for any identified areas of weakness.
 - The appraisal report will be held in the Principal’s personnel file and a copy will be secured in the Board’s file.
 - All documentation related to the principal’s appraisal interviews will remain confidential to the Board.
 - The performance agreement document will be made available to the Board as a confidential document.
 - In the event of a dispute, the Board will refer to the Primary Principals Collective Agreement. This policy will also have the Principal’s Professional Standards attached to it
 - The Board will ensure each party seeks the advice they desire and provides the evidence they deem relevant.
 - The Board, as the employer, will have responsibility for the final decision in any dispute.
 - The Chairperson will report annually to the Board on the Principal’s appraisal.



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COMPLAINTS PROCEDURE:

The Sunnyvale Board of Trustees complaints procedure follows the requirements defined by the Education Act

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1. The letter of complaint is acknowledged by the chairperson and the complainant will be advised of the next steps. The letter is part of the correspondence that will be dealt with at the next board meeting while the public is excluded.
2. The letter is tabled at the meeting (with the public excluded) and referred to relevant parties for reporting back to the board. The board decides whether to deal with the matter as a whole or appoint a committee to investigate and recommend to the board.
3. At the meeting of the board/committee the reports are received and the parties may be invited to speak to their complaint or answer questions. The board/committee considers the evidence and/or information and comes to a decision or recommendation.
4. Depending on the delegated powers of the committee either they or the board as a whole come to a resolution as to how the board will respond and/or what action will be taken.
5. The board's response is communicated to the parties to the complaint. This may be either publicly or confidentially depending on the case.
6. Any of the parties may request the board to reconsider their decision – however normally for such a reconsideration to take place new information that would have been relevant to the board's deliberations must be produced.

Board Process:

- Issues of a serious nature, e.g. allegations of physical abuse, may require a special meeting of the board to be called.
- All letters addressed to the chairperson of the board are for the whole board. The chairperson cannot decide independently as to what action will be taken.
- Resolution or dismissal of the complaint must not be discussed before all the information is to hand.
- Conflict of interest will be determined on a number of issues, including whether the complaint involves the actions of any trustee.
- The board must exercise caution when dealing with complaints regarding staff, particularly in relation to confidentiality and processes to ensure the principles of natural justice are met. It is advisable to contact the regional NZSTA personnel/industrial adviser in such cases. The board will need to consider the relevant staff disciplinary policies, employment contracts, and expert advice from the NZSTA Adviser.
- The board recognises that not all complainants will be satisfied with the outcome of a complaint. After one reconsideration, if the board is confident of its decision, it will refuse to enter into further discussion/correspondence. In making such a decision the NZSTA helpdesk can assist by giving an objective assessment of a board's processes in dealing with the complaint.
- A complaint regarding lack of compliance in relation to an agreed complaint resolution will be treated as a serious matter and actioned with urgency as a new complaint rather than as a reconsideration of the previous issue.
- Trustees need to be clear in their mind of the difference between a complaint they have as a parent (i.e. regarding their own child) and a complaint they have as a trustee (e.g. obstruction of staff preventing them carrying out board work). In the first instance they are required to follow the normal procedures and are excluded from decision making due



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to conflict of interest. The latter case is dealt with as an agenda item for the whole board (possibly with the public excluded).

- The principal must inform the insurance company in writing

DISCIPLINARY PROCESS

(a) Resolutions for the first meeting after the Annual Meeting

- Delegated Authority for Discipline Committee

Motion – To be Seconded and Carried

“That the powers conferred on the Board under Sections 16 and 17 of The Education Act 1989 be delegated to the Discipline Committee of the Board of Trustees, and the quorum for the Committee shall be three trustees.”

- Delegated Authority for Deputy Principal/s

Motion – To be Seconded and Carried

“That the Board directs that, except where the Board, at its discretion, otherwise determines, the Deputy Principal (and in the absence of the Deputy Principal the Assistant/Associate Principal) shall, in the absence of the Principal from duty and for the full period or periods of such absence, perform all the duties and powers of the Principal.”

(b) Terms of Reference determined for Discipline Committee

From time to time it may be necessary to stand down/exclude a student from school if that student’s behaviour is deemed to present a danger to him/herself or to other students or if that behaviour constitutes gross misconduct or repeatedly unacceptable behaviour.

Purpose:

1. To ensure that the learning environment is orderly and safe.
2. To ensure that all regulatory requirements are met.
3. To ensure that the rights of all students are upheld.

Guidelines:

1. The school will take all reasonable steps to modify a student’s behaviour before resorting to stand down/exclusion
2. A database of student behaviour patterns will be kept, this will include actions taken.
3. Full advice and guidance is available to students.
4. The best interests of all students are considered in final decision making.
5. The principal has the power to suspend students without referral to the Board.
6. For potential indefinite suspension a Board disciplinary sub-committee will be convened.
7. Clear procedures are established for handling suspension. These procedures will:
 - Meet legal requirements
 - Specify records to be made and arrangements for storage of records
 - Indicate the people/agencies to be notified.
8. Procedures will follow the appropriate Ministry of Education guidelines and requirements.
9. Families will be notified as soon as possible of the suspension and of its implications.
10. Guidance and advice is available throughout the whole process

OPERATIONAL POLICY



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DELEGATIONS TO THE PRINCIPAL

The Principal shall be empowered to make any decisions necessary in the day-to-day running of the school, subject to the professional standards as set out by the Ministry of Education and the Principal's employment contract.

Only decisions made by the board acting as a board are binding on the Principal. Decisions or instructions of individual board members, portfolio holders or committees are not binding on the Principal except in rare circumstances when the board has specifically authorized it. The relationship is one of trust and support. Both parties work to ensure "no-surprises". The Principal is not restricted from using the expert knowledge of individual board members acting as volunteers.

MONITORING PRINCIPAL'S PERFORMANCE

The Principal's performance is monitored against the strategic plan, professional standards and board policies on Operations.

The board monitors those parts of the Principal's objectives that have been identified and agreed upon by both parties in advance.

There will be an agreed time established when the Board Chairperson (or designated person or committee) and the Principal meet to carry out formal appraisal based on agreed criteria. The format and process for this meeting will be negotiated and agreed upon by the board chairperson/delegate and the principal.

The board will receive a summary report, formally once a year at a board meeting that has "excluded the public". "in committee"

(See the governance policy – Principal's Performance Appraisal)

DISCIPLINARY PROCESS

In the event the board determines that policy violation(s) has (have) occurred and the board judges the degree and seriousness of the violation(s) to warrant initiating a disciplinary process, the board shall seek advice and follow due procedure.

In dealing with issues of staff discipline it is important that the Board acts in a fair and reasonable manner as a good employer. Procedures for dealing with discipline issues must be equitable, consistent and open.

To ensure that the Board complies with all regulations and the provisions of relevant collective or individual agreements where procedures related to discipline, competency and dismissal are necessary.

- Every attempt will be made by the Principal and Board of Trustees to resolve any issues involving staff informally, with documentation kept, prior to these becoming major issues requiring "discipline".



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- A system of verbal and written warnings will be used as disciplinary measures. Verbal warnings will precede written warnings. All warnings will be placed on the staff member's file.
- Staff members facing alleged breaches of discipline or competency will be advised in writing of the right to request representation at any stage.
- Where necessary the Discipline Committee of the Board will meet to discuss matters of staff discipline.
- The principal will consult with the Board Chairperson prior to making any decision to invoke relevant clauses of the various agreement relating to discipline or suspension of staff.
- In dealing with alleged breaches of conduct or of staff competency all appropriate steps laid down in relevant agreements will be followed.
- The Principal and Board of Trustees will consult with an industrial advisor from the NZSTA when dealing with major issues of discipline or competency
- Where a dispute arises the School's Insurers must be notified immediately.
- Where a serious competency or issue of misconduct arises the Principal must contact EDUCANZ. (Refer to the Primary Teachers Collective employment agreement for clarification)

REPORTING TO THE BOARD

The principal reports to the board as a whole and keeps it informed of the true and accurate position of the outcomes of programmes and services; financial position; and all matters having real or potential legal considerations for our school. Thus the board is supported in its strategic decision-making and risk management. Therefore, the principal may not fail to:

- Inform the board of significant trends, implications of board decisions, issues arising from policy matters or changes in the basic assumptions upon which the board's strategic goals are based.
- Submit the monitoring data required in a timely, accurate and understandable fashion.
- Report and explain financial variance of 10% against budget
- Present information in a suitable form – not too complex or lengthy
- Inform the board when, for any reason, there is non-compliance of a board policy
- Recommend changes in board policies when the need for them becomes known.
- Limit public statements about the official position of the board on controversial social, political, and/or educational issues to what the board has formally adopted as positions of record.

CURRICULUM DELIVERY

Delivery of the curriculum shall foster student achievement. Therefore the principal will:

- Ensure opportunities for success in all essential learning areas and skill areas of the New Zealand Curriculum
- Report on progress and achievement of students on the basis of good quality assessment information.
- Identify students and target groups of students who are not meeting national standards, with emphasis on priority learners.
- Provide appropriate learning support

PERSONNEL

The board delegates responsibility to the principal on all matters relating to the management of staff in the expectation that they will be managed in a sound, fair, and respectful manner in



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accordance with the current terms of both employment legislation and the relevant employment agreement

Therefore, the Principal may not fail to:

- Ensure that employees are not discriminated against on other than clearly job-related criteria, individual performance or qualifications.
- Ensure all employees their rights to personal dignity, safety and access to an approved and fair internal grievance process.
- Ensure that all required staff are registered or have a current Limited Authority to Teach or have had a sufficient Police check. If the Principal has concerns about the result of the police check he/she can refer to the Board.
- Provide a smoke free environment
- Provide for all staff agreement, either individual or collective
- Carry out annual performance appraisals
- Meet current employment legislation
- Take reasonable steps to protect staff from unsafe or unhealthy working conditions
- Provide Protective Disclosure protection

EMPLOYMENT

The Board requires that:

- All employment practices and procedures comply fully with the requirements of current legislation and employment agreements.
- Appointment procedures be fair and equitable
- An effective induction programme be in place for all new staff
- Staff appraisal systems are used for both teaching and non-teaching staff.
- Professional development opportunities are provided for all staff.
- Procedures be followed for the application and approval of leave
- Staff records are properly maintained
- That an appropriate disciplinary procedure is followed
- That a staff handbook covers the above and other essential matters regarding the day to day operation of the school.
- In accordance with the boards delegation of authority the principal will follow management level procedures to ensure that the board's expectations with regard to employment and personnel are met.
- The principal will report regularly at board meetings on employment and personnel matters
- The Board will make annual provision in the budget for employment and personnel matters.

APPOINTMENTS

It is important that the most suitable and best qualified staff are appointed to fill vacancies in the school. A fair, reasonable and consistent process should be applied to making appointments.

The Board/Principal will:-

- Appoint applicants to positions according to identified criteria and identified school needs.
- Ensure that the most suitable applicant is appointed.
- Procedure for appointing the principal will involve consultation and participation of the full Board.



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- At least one member of the Board (other than the Principal or Staff Trustee) will be involved in the appointment of all senior staff, the Executive Officer, the Property Manager and the School Secretary.
- EEO implications will be considered when making appointments.
- The Board will delegate to the principal all appointments of support staff and of Scale A teachers.
- The Board, however will ratify ALL appointments.
- Appropriate consultation with staff will be carried out as part of the appointment process.
- Person Specification and Job Description will be prepared for each vacancy.
- An appointment process will be followed including advertising.
- Where necessary an outside education professional may be engaged to assist in the appointment process.
- In the event of no suitable applicants the board will re-advertise the position.
- All successful applicants for non-teaching, support staff and contracting positions will be police vetted.
- In the event of a staff resignation or termination of employment, the Principal will conduct an exit interview, where applicable

STAFF INDUCTIONS

The Board of Trustees of Sunnyvale School requires that all new staff are made to feel welcome at the school and that they quickly become familiar with the school and it's policies, procedures, Health & Safety requirements and day-to-day operation.

STAFF APPRAISALS

- All teaching staff will be appraised annually in accordance with EDUCANZ criteria.. The Principal will oversee the process and will, as a minimum, report 6-monthly to the board on teacher appraisals. The content of the report will contain a general overview of the professional goals set for staff, planned professional development, proposed actions, prospective expenditure and outcomes.

Teaching Staff:

- All teaching staff will be appraised by a member of the senior management team or their TT.
- Senior Teachers will be appraised by the Deputy Principal
- Deputy Principals will be appraised by the Principal.
- all staff will have a Performance Agreement that is agreed by Appraiser and Appraisee and discussed with the principal
- Appraisers meet with appraisees to determine personal and professional goals for each Teacher. These goals become the written draft and both parties hold a copy of the draft appraisal document.
- The initial meeting is followed by classroom observations and written feedback each term by the appraiser.
- The appraiser then writes a written report towards the end of the year which is discussed with the Appraisee.
- All professional goals set will be reported to the principal.
- Appraisal documentation must be stored in a secure location.
- Where necessary the Appraiser/Senior Teacher will arrange teacher release time for professional development.



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- The principal will report to the Board twice a year regarding Teacher's Appraisals.

Non-Teaching Staff:

- All non-teaching/support staff will be appraised annually.
- All non-teaching/support staff will be appraised by the Principal or a member of the senior management team.
- The Board delegates to the Principal the decision of who should be responsible for the appraisals.
- The Principal will report to the Board Annually regarding Non-teaching/Support staff Appraisals.

STAFF RECORDS:

In accordance with the Privacy Act the board will ensure that staff records are kept in a secure location accessible only to the Principal which contain the following information:

- Letter of offer of employment and acceptance
- Record of payroll reports
- Record of hours worked
- Appraisals
- Formal disciplinary action (if any)
- Accident reports if any. This may be held in the ACC folder
- Teacher Registration
- Qualifications for Payroll
- Any other information regarding work that may be relevant to the staff member employed at Sunnyvale School

Staff may, through the principal, view their files and may photocopy contents. However the principal may withhold evaluative material such as referees' reports.

In accordance with relevant legislation, staff records will be kept for a period of six years following an employee leaving.

Under NO circumstances will personnel records be removed from the school.

DISCRETIONARY LEAVE

From time to time staff members may request leave from school either for reasons contained in their collective agreement or for reasons other than those covered. It is important that all applicants be treated fairly and equitably.

The Principal/Board will:

- ensure that all staff are aware of the application process.
- ensure that all leave applications are treated fairly and equitably.
- maintain appropriate staffing levels.

For five days or fewer

- No staff member is entitled to leave as of right
- The Principal is delegated the authority to grant leave applications of up to five days. However all applications for leave must be ratified at the closest board meeting.
- In making decisions the Principal will consider the following:-
 - the reason for the application



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- the frequency of application
- the effect of granting a requests on the running of the school
- the time of the year
- the appropriateness of the length of leave
- In responding negatively to a request for leave the Principal will provide a reason for denial.

For more than five days

- No staff member is entitled to leave as of right.
- All applications must be submitted in writing to the Principal prior to a Board Monthly Meeting.
- Staff should consult the relevant collective agreement prior to submitting an application.
- In considering the application the Board will look at all relevant issues.
- Leave with or without pay will be at the discretion of the Board having due consideration to relevant agreements.
- All decisions will be in a manner that is consistent, fair and equitable.

EQUAL EMPLOYMENT OPPORTUNITIES

The Board of Trustees of Sunnyvale School will fully comply with the requirements of the State Sector Act relating to providing fair opportunities for all employees and potential employees to gain employment at the school.

FINANCE

According to legislation on financial and property matters, Sunnyvale School Board of Trustees is also required to:

- Allocate funds to reflect the school's priorities as stated in the charter.
- Monitor and control school expenditure, and ensure that annual accounts are prepared and audited as required by relevant legislation
- Comply with the negotiated conditions of any current asset management agreement, and implement a maintenance programme to ensure that the school's buildings and facilities provide a safe, healthy, learning environment for students.

Responsibilities:

- The overall responsibility of monitoring and controlling the financial affairs of the school rests with the Board of Trustees.
- The responsibility for the day-to-day management of the financial affairs of the school rests with the principal who will work within the authority delegated by the board.
- The board will be responsible for maintaining an overview of financial matters.
- The board may engage a professional and suitably qualified financial services provider to maintain the school accounts, prepare monthly financial reports, prepare the annual financial report and provide advice as required.
- To protect the Board and the School from potential fraud all financial procedures must be adhered to.

FINANCIAL PLANNING

Budgeting will reflect the board's strategic results, not risk financial jeopardy, and will show a generally acceptable level of foresight. Thus the budget will:

- Reflect the results sought by the board
- Reflect the priorities as established by the board



SUNNYVALE SCHOOL POLICIES

- Comply with the board's requirement of a balanced budget
- Ensure adequate working capital
- Demonstrate an appropriate degree of conservatism in all estimates
- The principal has authority - within the limits imposed by the above delegated authority to delegate spending limits to identified staff.

FINANCIAL CONDITIONS:

The financial viability of the organisation must be protected at all times. Therefore, the principal shall not:

- Incur unauthorised debt
- Violate generally accepted accounting practices or principles
- Use tagged funds for purposes other than those approved
- Spend more funds that have been allocated in the fiscal year
- Fail to ensure all money owed to the school is collected in a timely manner
- Fail to make timely payment to staff and other creditors
- Sell or purchase unauthorised property
- Spend on single items beyond a board-established limit
- Fail to ensure that no one person has complete authority over the school's financial transactions
- Make any purchase:
 - Of over \$1,000.00 without having obtained comparative prices and quality
 - Of over \$5,000.00 without an adequate review on ongoing costs, value and reliability.
- Spend no more than \$1,000.00 above any budget without reference to the Board

Limitations:

The chairperson and one other must sign any cheque that is over \$10,000.

Signing Authority:

All bank accounts and authorities may be signed on behalf of the Board by any two of the following:

Board Chairperson
The Principal
Accounts Manager
Staff Trustee

CREDIT CARD POLICY

The Board of Trustees (the Board) of Sunnyvale School (the School) has consulted with staff and parents in the formulation of this Policy (the Policy). The Policy was approved and adopted by the Board at its meeting held on 26 March 2014 and became effective from that date.

Introduction

1. The Board agrees that it has a responsibility to ensure that credit card expenditure incurred by the School must clearly be linked to the business of the School. The Board has agreed on the fundamental principles of the Policy, as has delegated responsibility for the implementation and monitoring of this Policy to the Principal.
2. The Board requires the Principal, as the chief executive and the Board's most senior employee, to implement and manage this Policy. The Principal may, from time to time, further delegate some of their responsibilities, and all such delegation must be attached as appendices to this policy.



SUNNYVALE SCHOOL POLICIES

- The Board has access to review the credit card expenditures at Board of Trustee monthly meetings.

PECUNIARY INTEREST POLICY

Legal Obligations

A trustee who has a pecuniary interest in any matter may be excluded from any meeting of the Board while it discusses, considers, considers anything relating to or decides the matter. Sixth Schedule, Section 8, Meetings number 8.

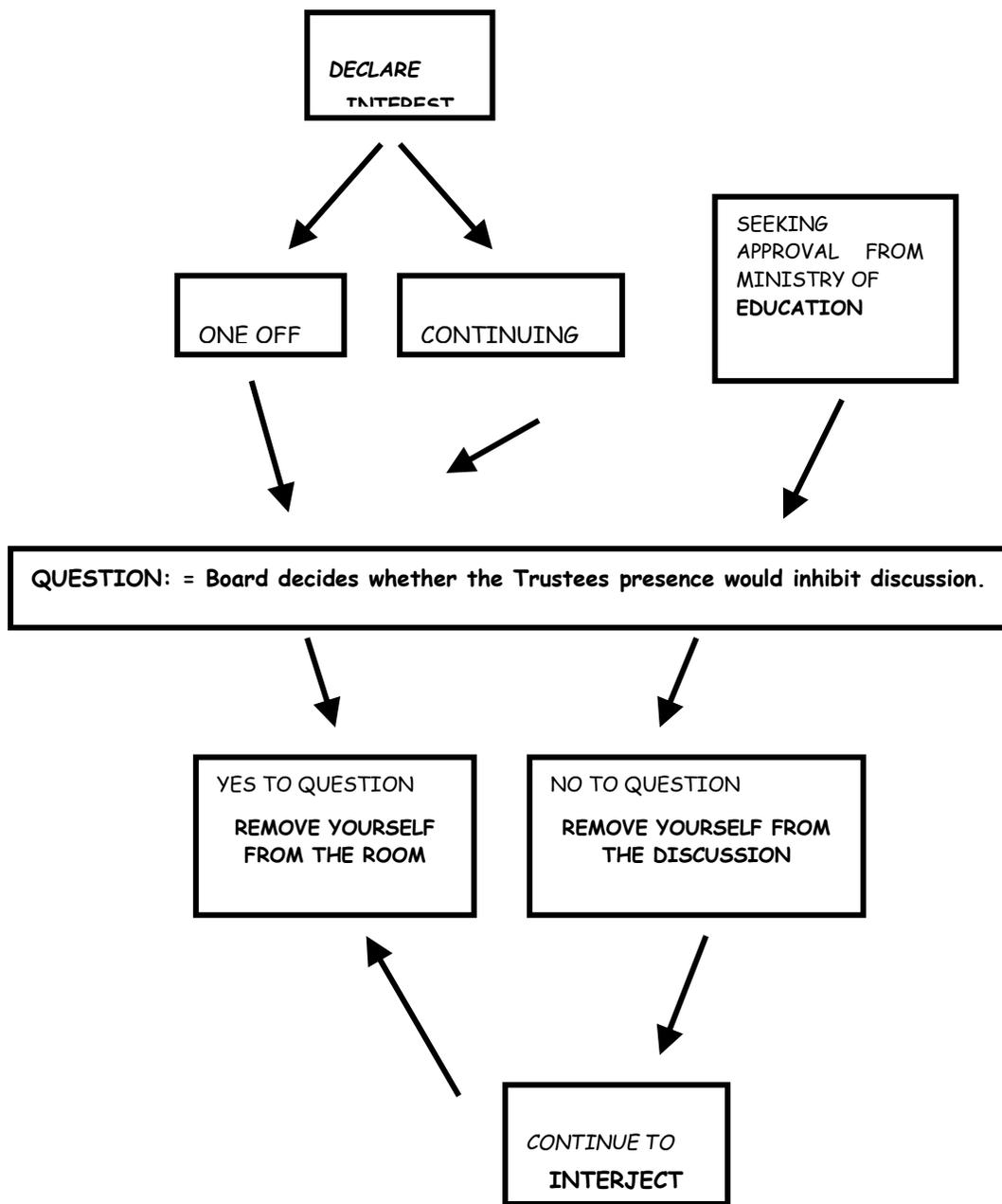
Policy

By law (Education Standards Act) any trustee must declare an indirect or direct financial interest they must follow the procedures below.

Definition

A trustee is deemed to have a pecuniary interest when he/she may gain or lose financially either directly or indirectly from a decision made by the Board.

Procedure





SUNNYVALE SCHOOL POLICIES

CONFLICT OF INTEREST POLICY

Legal Obligations

A trustee who has a pecuniary and/or conflict of interest in any matter may be excluded from any meeting of the Board while it discusses and considers anything relating to or decides the matter. Sixth Schedule, Section 8, Meetings number 8.

Policy

By law (Education Standards Act) any trustee must declare an indirect or direct financial interest they must follow the procedures below.

Definition

A trustee is deemed to have a conflict of interest when he/she has a direct interest in the decision the Board is making, above their interest as a Board Member.

ASSET PROTECTION

Assets must be protected, adequately maintained and kept secured. Accordingly, the Principal must:

- Insure assets
- Allow only authorised personnel to handle funds or school property
- Keep plant and equipment sufficiently maintained
- Ensure the implementation of the 10 year property maintenance plan
- Protect intellectual property, information and files from loss or significant damage or unauthorised access or duplication
- Receive, process or disburse funds under controls that meet the board-appointed auditors standards
- Invest or hold operating capital in secure accounts, or interest bearing accounts except where necessary to facilitate ease in operational transactions
- Keep the asset register up to date

PROPERTY MANAGEMENT DELEGATIONS

Day to day property management:

The day to day administration and management of property and assets is the responsibility of the Principal.

Urgent Repairs:

The Principal is delegated the authority to authorise any urgent repairs and maintenance required to safeguard the health and safety of pupils and staff. The Principal will seek additional funding from the Ministry of Education for the payment of such work.

When Necessary the Board will:



SUNNYVALE SCHOOL POLICIES

Delegate a property portfolio holder who is to maintain an overview of the property responsibilities of the board. He or she will work closely with the principal and caretaker.

- The formulation in conjunction with the principal and/or another suitably qualified person of annual and long term maintenance programmes for property.
- The review of the annual maintenance programme and associated costs for inclusion in the annual budget.
- The annual review of the property occupancy agreement to ensure that the board is complying with its conditions.
- The assessment of capital works requirements.
- The caretaker will follow his/her inspection procedure and report to the Board once a term

HALL HIRE POLICY

The Board of Trustees agree that the hall or any similar building within the school environment will not be hired out for the purpose of a private function, i.e. birthday, 21st, anniversary, wedding, hair cutting ceremony and such like.

At all times the hireage of the hall for the community groups will be at the discretion of the Sunnyvale Board of Trustees. The Hall will only be hired out for Community Groups i.e. church groups, dance groups, martial arts classes, art classes etc.

The Board of Trustees will follow the guidelines of the Community Use Agreement signed by the Board of Trustees, Ministry of Education and Auckland Council.

Each hiree needs to fill out a Hire Agreement and pay the appropriate bond and hireage charges. The Board will receive a full report of income/expenditure at the end of each year and send a copy to ASB & Auckland Council Partners.

HEALTH AND SAFETY

Students and staff shall have a safe physical and emotional learning environment. Therefore, the Principal will:

- Take reasonable steps to protect school users from unsafe or unhealthy conditions
- Provide a smoke free environment
- Ensure a risk analysis management system (RAMS) is carried out where and when appropriate
- Consult with the community regarding the health programme being delivered to students
- Provide privacy of personal documentation held at school

STUDENT BEHAVIOUR MANAGEMENT:

Why have this policy?

The philosophy of Sunnyvale School is to provide an inclusive and positive education which is fostered in a holistic manner. Student behaviour is viewed as a part of child development that will be modelled and encouraged within a partnership between home and the school. Inclusive practices and safe environments are of greatest importance to all students.



SUNNYVALE SCHOOL POLICIES

Behaviour goals have been formulated to provide a school wide approach in this area. This is our 'Reflection' philosophy and it is highly visible in all interactions and flows through to every part of our school community.

What is it for and how do we do this?

Behaviour Principles

- Behaviour is a form of communication.
- The emphasis is on belonging and social responsibility.
- An appropriate curriculum and effective teaching engages learners and encourages appropriate behaviour.
- An environment of high challenge and low stress is most conducive to learning and appropriate behaviour.
- Students need access to role models who are aware of and manage their own emotional responses appropriately.
- An emphasis is placed on the use of positive strategies to increase desirable behaviours.
- Student's behaviour is underpinned by the stage they have reached in their social and emotional development.
- Behaviour is learned and therefore amenable to change.
- Some emotions can block learning, while others promote learning. So learning to recognise and manage emotions can assist learning and help to improve standards.
- Assertiveness is essential; it involves confirming rights and responsibilities with respect to school guidelines.
- Consequences need to teach the students what to do instead. The focus is on repairing the harm done and using the incident primarily as a teachable moment.
- Improvement in a student's behaviour is significantly better when working in partnership with parents and carers. Positive messages home can make a difference if parents are also involved in the reinforcement process.

Managing behaviour relies on consistently applying both our school's '*Reflection*' philosophy and strategies to promote positive student behaviour.

At Sunnyvale Primary School:

Within school:

- Teachers maintain positive learning environments and relationships with students.
- The Key Competencies in the New Zealand Curriculum and the values/beliefs of Sunnyvale School community encompasses student development in this area.
- Clearly articulated school-wide expectations for student and staff interactions are in place. Classroom guidelines and treaties will be developed at the beginning of the school year and need to be frequently revisited and reinforced in an affirming manner.
- Monitor wider classroom/playground behaviour carefully for potential areas of conflict
- All members of the school, including the students themselves, have a responsibility to recognise bullying and to take action when they are aware of it happening.
- A restorative justice process which reflects clearly communicated expectations, actions and consequences will maintain the dignity of the individuals involved so that 'natural justice' principles are upheld at all times.
- We consistently apply an appropriate behaviour intervention in all cases of unacceptable behaviour.
- All issues and incidents are to be viewed as learning opportunities for individual growth, appropriate interactions and consequences need to reflect this. Any incident or issues of



SUNNYVALE SCHOOL POLICIES

concern need to be communicated to the Leadership team who will be involved in the outcomes.

School and Community:

- We make a clear statement of acceptable and unacceptable behaviour known to all staff, parents, and students.
- These behaviour goals are applicable during the school day, coming to and going from school, on school trips and at all events organised by the school.
- Parents/caregivers, where necessary, will be involved when a student's behaviour is causing concern to enable their cooperation.
- The school actions the procedures outlined by the Ministry of Education for the stand-down, suspension, or exclusion of students, in cases of extreme and persistent behaviour.
- Individual programmes and strategies for students with particular behaviour difficulties are devised with parents and staff, and outside agencies if necessary, and these students may be dealt with outside the school's behaviour plan.
- Where deemed appropriate, further assistance will be sought with external agencies e.g. R.T.L.B. or Ministry of Education Special Education. This will occur through the Senior Leadership team after discussions between school, home and student. The Learning Support processes will apply.

See our *"Reflection"* behaviour guidelines for more information.

Parents' concerns about student behaviour

If a parent has a concern about an incident at school, the parent should contact the school and the school will deal with the concern. The school believes that parents should not approach other students or parents about school behaviour incidents.

Contact between staff and students at school

- Staff may need to physically help students from time to time, especially in the case of younger students, temporary physical contact such as holding a hand, or a guiding hand on the arm, back or shoulders to remove a student from a situation to a safer place.
- When staff are interacting with a student one-to-one, they ensure wherever possible that the space is not closed off from other people.
- Teachers take particular care with students who express themselves freely and seek close physical contact. When this is a problem, it is always discussed with the child's parents.
- Staff are aware that students with **special needs** may have particular needs with regards to safety and supervision.
- Corporal punishment is prohibited and staff are to avoid physical contact with students that could be considered intimate, sexual, threatening, or violent.
- If a teacher is attacked by a student, they protect themselves without causing injury to the student involved, and immediately report this incident to the principal. If a student cannot be restrained in any other way, the adult physically restrains the student as appropriately as possible, and seeks other adult support. See **Physical Restraint** section below.



SUNNYVALE SCHOOL POLICIES

Time-out and seclusion

- Seclusion is prohibited at Sunnyvale School. Seclusion is defined as placing a student, involuntarily, into a room by themselves for any amount of time, where they cannot leave of their own will. It is inappropriate, and can be emotionally (and physically) damaging to students.
- Time-out is different from seclusion, and can be used at school. In time-out, a student may be asked to go to a specified area, either within the classroom or in another part of the school, in order to calm down. In these situations, the student may be separated from others, but is not secluded. Any student in time-out is checked regularly by staff.

Physical Restraint

- Sunnyvale School has procedures in place for managing student behaviour and guidelines around the care and management of students. The key point is to safeguard the well-being of students, staff, and others whenever behaviour management issues arise.
- Staff use preventative and de-escalation techniques (see the Ministry of Education guidelines referenced below) if a student's behaviour is becoming out of control and/or poses a danger to themselves or others. The other students can be removed from the situation which may calm the student down.
- However, in an emergency situation, it may be necessary to use physical restraint. This is a serious intervention and only used when there is 'imminent danger of physical injury' of other students, staff, themselves, or others. It may be necessary to move people out of the area to de-escalate the situation and keep them safe. In some cases, it may be necessary to involve the Police.
- The Guidelines for Registered Schools in New Zealand on the Use of Physical Restraint must be followed in all circumstances.
- If physical restraint is warranted, the level of restraint should be proportional to the level of risk the student or their behaviour poses, and should end as soon as the safety of everyone involved is assured. Ideally, physical restraint should only be applied by staff trained in its safe use.
- It is important to monitor the student, and the person who applied the physical restraint for signs of distress or shock in the aftermath of the incident.
- The school holds a debrief after the incident, using the Ministry of Education appropriate forms. This will examine the events leading up to it, the interventions used, and what could have been done differently. Staff must complete a Staff Physical Restraint Incident form within 24 hours.
- An Incident of Physical Restraint Form is to be completed and given to the Principal, who will notify MOE using their approved format. The Board is notified of any incident involving physical restraint at the next available BOT meeting or earlier if deemed by the Principal to be the correct course of action.
- Parents/caregivers whose child was involved in the incident should be notified on the same day, as soon as practically possible. They should be invited to offer suggestions to avoid the use of restraint in the management of their child's behaviour. Any complaints from parents should be dealt with through the school's complaints process, and the Ministry of Education or School Trustees contacted for advice, if necessary.
- Students with high-risk behaviours should have an Individual Behaviour Plan in place. Key staff members and parents/caregivers are involved in the development of the plan. All staff working with the particular student are fully briefed on the agreed protocols in the plan, and all staff are made aware that there is an Individual Behaviour Plan in place for the student.

Monitoring the use of physical restraint



SUNNYVALE SCHOOL POLICIES

The principal, or delegate, monitors the use of physical restraint and collates information about any incidents. The principal shares this information with the board through the Principal's Report at Board meetings (in a public-excluded session).

Appendix 1

- MOE Guidelines for Registered Schools in New Zealand on the Use of Physical Restraint – August 2017
- Staff Physical Restraint Incident Report Form

Appendix 2

- Information for the MOE and Employer Form

Related Documents

- Child Protection Policy
- Stand-downs, Suspensions and Exclusions Policy
- Complaints Policy
- Health and Safety Policy
- Education Act 2017
- Procedures Manual

SEXUAL HARASSMENT:

The Sunnyvale School Board of Trustees regards sexual harassment as a serious offence which will not be tolerated.

The Board requires that all employees and students be able to work and learn in an environment that is safe and free from sexual harassment.

The Board considers sexual harassment to be any offensive, unasked for behaviour which subjects a person to unwelcome verbal or physical conduct of a sexual nature which may include:

- Offensive jokes, cartoons, posters, pin-ups
- Offensive questions, comments, abuse, leering
- Unwanted, unnecessary, deliberate physical contact, touching and gestures
- Question and comments about private life in any format
- Requests for sexual favours implying promises of favourable treatment or threats of unfavourable treatment including homophobic and transgender.
- Ensure that photographs and comments on social media are monitored and behaviour is non-offensive

SUN SAFETY:

The Board of Trustees of Sunnyvale School considers that Ultraviolet rays of the sun cause skin damage, which may result in serious health problems, and therefore requires that appropriate programmes be put in place which

- Increase student awareness of the dangers of overexposure to the sun.
- Encourage responsible decision making and good habits regarding skin care.
- Are fully supported by parents, caregivers, staff and board of trustees.



SUNNYVALE SCHOOL POLICIES

- Work towards developing a school environment which provides adequate shade for students and staff.

EQUALITY:

The Board of Trustees of Sunnyvale School requires that no person or group in the school should be disadvantaged because of their gender, religion, ethnicity, sexuality, ability or disability, socio-economic status or physical appearance.

The Principal shall ensure that:

- Any practice, which disadvantages individuals or groups through no fault of their own, be identified and modified.
- Equal access to school programmes and resources is provided for all students.
- The selection of learning materials should take into account the board's equity policy and in particular should be non sexist and non racist.
- Programmes be established which are designed to eliminate prejudice and stereotyping amongst students.
- All forms of harassment (including sexual) be eliminated.
- That any groups not performing to their potential be identified and the causes be determined so that steps can be taken towards remedying them
- Ensure that there are staff development programmes which address equity/equality concerns.

CHILD PROTECTION:

Sunnyvale School is committed to the prevention of child abuse and to the protection of children. This commitment means that the interests and welfare of the child will be the prime consideration when any decision is made about a child suspected of being abused.

Sunnyvale School supports the roles of statutory agencies (the Police and the New Zealand Children and Young Persons Service) in the investigation of abuse and will report cases of suspicion of abuse to these agencies.

The Principal will ensure that clear procedures are in place for the identification and response to suspected cases of child abuse.

LEGAL RESPONSIBILITIES:

The Principal will ensure that school procedures will meet the legislative statutes and regulations as set down in the appropriate Acts, Ministry of Education circulars and the Education Gazette.

CLASSROOM RELEASE TIME:

Purpose:

- The intent of classroom release time is to address teacher workload while maximizing benefits for students learning.
- The use of classroom release time will be professionally for the school's teaching and learning programmes, the teacher's professional growth and the learning needs of the student's.



SUNNYVALE SCHOOL POLICIES

Use of Classroom Release Time

This policy contains a list of the most common uses for classroom release time in our school. The list may be amended from time to time through consultation with teachers. Principals and individual teachers may also agree to other uses from time to time.

At Sunnyvale School classroom release time may be used for:

Planning	
Evaluation	
Reporting / professional development that is identified through appraisals	
Observing other teachers within our school or other schools / being observed by management / senior teachers	
Reading/Research	
Syndicate meetings	
Assessment / testing	
Any other use agreed to from time to time between teacher and principal	



SUNNYVALE SCHOOL POLICIES

Allocation of Classroom Release Time.

Each teacher will be rostered an hour per week, as timetabled, this might be in the form of one whole day or part of a day. The roster will be generated by the Deputy Principal, taking into account where possible the requests of individual teachers.

Allocation of other forms of release time

Position	Time Allocation	Reason
Beginning teacher	.2 or .1	Beginning teacher support
Senior teacher	1 block	Management / Appraisal

When Classroom Release Time cannot be provided for genuine reasons.

Where for genuine reasons, during term planning or at short notice, it is not possible to provide Classroom Release Time to an individual or group of teachers the school will:

- Record the reason for non-delivery
- Not transfer from one term to the next
- Review the Classroom Release Time Policy if required
- Use the record of non-delivery when reviewing the policy

Some examples of unusual circumstances are

- Camp
- Illness
- Professional Development
- Reliever Sick

Review of this policy

This policy will be reviewed as required in the following instances:

- Staff turnover
- Recruitment/Retention Issues
- New Education initiative e.g. introduction of specialism
- Concern about benefits to student learning
- Any other genuine issue or concern
- Each year the reason for allocation might change due to schools needs and availability of resources and staffing

ALLOCATION OF UNITS OF RESPONSIBILITY:

Guidelines

1. The allocation of units of responsibility will be governed by the management needs of the school in relation to :
 - Curriculum delivery
 - Responsibility, recruitment and reward, e.g. Team Leaders, Planning and Professional Development Programmes
2. As a conclusion to the decision making process, the Principal and Board of Trustees will have the final responsibility as to the distribution of units of responsibility.
3. Units/allowances are to be allocated through a process that is fair, has teacher input and puts the needs of the school first.

SEVERE ALLERGY POLICY:



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Rationale

The growing number of children in New Zealand who have severe allergic reactions to everyday food items has meant that Schools require a framework for meeting their needs.

Purposes

To provide a framework for the school to safely accommodate the needs of students with severe allergies who required an Epi-pen.

Procedures

- 1 Parents need to inform Principal at time of enrolment of health concerns i.e. allergies.
- 2 If student requires an Epi-pen an individual health plan for this will be developed.
- 3 School Secretary, via Principal's authority, will contact Health Nurse who will formulate a plan which will be given to Admin staff in the office, the class teacher and the parents. Staff will be informed via admin meeting.
- 4 Students at Sunnyvale will be encouraged not to share food.
- 5 A student who has a severe allergy will be encouraged and supported to take responsibility for their needs.
- 6 Careful consideration needs to be given when a class teacher of a severe allergic student plans a class celebration involving food.
- 7 Health Nurse regularly to inform staff on "how to administer Epi-pens".

FAMILIES WITH LEGAL DOCUMENTATION:

Rationale

To keep school staff informed of any legal proceedings relating to school pupils and their families. This may include:

- Protection Orders
 - Custody orders
 - Adoption of children
 - Any child protection information re placement of children/uplifting children/interviewing children at school
 - Lawyers acting on behalf of children
1. Parents/caregivers that bring documentation to school will be seen by a member of the Senior Management Team to discuss any issues pertaining to the student/s at school
 2. All documentation will be photocopied and placed in the students file.
 3. A note of the documentation will be kept of the students "Sensitive File" of Student Manager. This will be kept up to date.
 4. Staff will be kept informed through Senior Management of any documentation and of any changes that may take place.
 5. If any person/s approaches school that is not legally permitted to be on the property, Senior Management will ensure that:
 - i. The Legal Caregiver is informed immediately
 - ii. The situation remains calm and safe
 - iii. If not, then the police will be called and the student/s involved to be kept safe until the matter is resolved.