

Proprietor boundaries in a state-integrated school

This document provides an overview of the four key areas of shared focus between the board and proprietor: enrolment, employment, property, and the teaching of faith or philosophy. The document provides guidance on boundaries, how to avoid overreach, and maintaining clear separation of powers.

Purpose

The proprietor's role in a state-integrated school is to safeguard and preserve the school's special character framework. They do this by exercising their roles and responsibilities in relation to special character and to proprietor property. An intentional proprietor role is essential, but so is a clear understanding of the mandate of the proprietor and the relationship with the school board. Good outcomes depend on clear boundaries, role clarity, and an operating style that builds trust with the board rather than substituting for it.

This document summarises the proprietor's responsibilities in four core areas—enrolment, employment, property, and the teaching of faith or philosophy, and explains how to maintain a proper separation of powers so the proprietor does not drift into the governance or management of the school.

1) Enrolment

What the proprietor is responsible for:

The proprietor defines the preference criteria for enrolment based on the school's special character. This typically includes:

- **Preference framework stewardship:** setting and maintaining the basis on which preference is granted (aligned with the school's special character).
- **Preference decision-making (where applicable):** issuing, declining, or withdrawing preference certificates in line with the special character criteria and any agreed processes.
- **Special character integrity:** ensuring preference is applied in a way that genuinely protects the special character and is defensible, fair, and consistent.
- **Relationship and transparency:** sharing criteria, documentation, and guidance so families and the board understand how preference operates.

Boundary discipline: what the proprietor should *not* do

To avoid drifting into the work of the board, the proprietor should not:

- **Run the school's operational enrolment process** (waiting lists, communications, day-to-day administration).
- **Direct the principal on who to enrol** or intervene in individual operational decisions except through the legitimate preference process.
- **Pressure the board to exceed roll, staffing, or property capacity** where that undermines sound governance or compliance.

Practical boundary tools

- Agree a **Preference Guidance & Process** document (criteria, evidence, timeframe, appeals/review pathway).
- Use a **single channel** for preference decisions (e.g., a proprietor delegate) and keep records.
- Hold **termly enrolment integrity check-ins**: trends, preference demand, and any risks, without taking over administration.

2) Employment (appointments and staffing that affect special character)

What the proprietor is responsible for:

The proprietor's employment role is not to employ staff (that is the board's function), but to **protect special character through appointment related rights and expectations**, commonly including:

- **Special character expectations for key roles**: articulating the requirements for roles that carry special character leadership (e.g., principal, DRS/DRC, senior leaders, specified positions).
- **Participation in appointment processes (where provided for)**: involvement in recruitment/selection processes for special character positions, consistent with agreed process, and legislation.
- **Acceptability endorsement functions (where applicable)**: confirming the candidate can uphold and advance the special character.
- **Formation expectations**: signalling expectations for induction and ongoing formation so staff can authentically contribute to the special character of the school.

Boundary drifting: what the proprietor should *not* do

To maintain separation of powers, the proprietor should not:

- **Act as the employer** (performance management, discipline, day-to-day direction, rostering, leave approvals).
- **Bypass the board** by instructing staff directly or creating parallel reporting lines to the proprietor.
- **Replace merit-based appointment processes** with informal preference or patronage. Special character matters must sit alongside professional competence and the lawful process.

Practical boundary tools

- A clear **Appointments Protocol**: who does what, when proprietor input occurs, what “acceptability” means, and how disagreements are resolved.
- A **Special Character Role Description Addendum** for positions with special character responsibilities.
- A joint **Formation & Induction Plan** (board/principal deliver; proprietor supports and resources).

3) Property

What the proprietor is responsible for:

The proprietor is typically responsible for the **ownership, stewardship, and strategic oversight of proprietor property**, including:

- **Stewardship of proprietor assets**: ensuring buildings/land used as part of the school’s integrated space is protected, maintained appropriately, and fit for purpose.
- **Integration property responsibilities**: managing and funding obligations that sit with the proprietor under the integration framework and related agreements.
- **Strategic property direction**: long-term property planning aligned to special character, enrolment demand, and sustainability.
- **Approvals and controls**: giving consent where required for projects that affect proprietor property, and ensuring works align with standards, insurance, and risk settings.

Boundary drifting: what the proprietor should *not* do

To avoid overreach, the proprietor should not:

- **Manage the school’s day-to-day operational property matters** that sit with the board (minor works, operational maintenance, contractor scheduling for board-funded items), unless agreed.

- **Create confusion by changing expectations mid-project** (scope, funding split, timelines) without documented agreement.

Practical boundary tools

- A one-page **“Who funds what”** agreement (proprietor vs board vs Ministry), reviewed annually.
- A **Property Decision Pathway**: what requires proprietor approval, typical timeframes, and information requirements.
- Regular **tri-party planning rhythm** (board–proprietor–principal) for 10Y/5Y/annual property planning and urgent works escalation.

4) Teaching of faith or philosophy (special character delivery)

What the proprietor is responsible for

This is the proprietor’s core “why”: ensuring the school’s **special character framework is authentic, visible, and lived**. Responsibilities commonly include:

- **Defining and safeguarding special character**: articulating the foundational values, beliefs, and practices that make the school unique.
- **Expectations for delivery**: setting expectations for how faith/philosophy is taught and embedded (curriculum, liturgy/worship where relevant, pastoral life, community practices).
- **Assurance and review**: ensuring there are meaningful ways to know whether special character is being delivered well (review, self-review support, agreed indicators).
- **Formation support**: providing resources, guidance, and opportunities that build staff capability to deliver special character confidently and safely.

Boundary drifting: what the proprietor should *not* do

To maintain proper separation, the proprietor should not:

- **Take over pedagogical management** (classroom oversight, teacher direction, assessment decisions) which sit with professional leadership and board policies.
- **Create parallel “instruction lines”** to staff that undermine the principal’s leadership.
- **Use special character as a catch-all** to intervene in non-special-character operational matters.

Practical boundary tools

- A concise **Special Character Guidelines** document from proprietor to board (expectations, indicators, reporting frequency). See the Special Character Guideline resource on the APIS website.
- A **Special Character Annual Plan** that sits within the school's strategic and annual planning (owned by board/principal; supported by proprietor).
- An agreed **review/assurance cycle**: what evidence is used, who gathers it, and how findings are acted on.

Ensuring quality governance and guardianship

Effective governance depends on role clarity. The proprietor can be both a vision carrier and a disciplined partner by applying these principles:

1) Separation of powers is protective, not adversarial

Clear boundaries protect:

- the board's lawful governance role (strategy, policy, oversight),
- the principal's management role (operations and professional leadership), and
- the proprietor's guardianship role (special character and proprietor property).

2) Use “expectations and assurance,” not “direction and control”

A good test:

- **Appropriate**: “Here is the expectation; here is the evidence we will review; here is the support we can provide.”
- **Adversarial**: “Do it this way, by this date, and report to us directly.”

3) One voice, one channel, documented agreements

Avoid informal influence that blurs boundaries:

- keep communications structured (chair to chair, proprietor appointee to chair/principal as agreed),
- document protocols (especially for enrolment preference, appointments, and property approvals),
- resolve disputes through agreed pathways rather than personal escalation.

4) Make the grey areas explicit

Where roles naturally touch (e.g., principal appointment; property approvals; preference integrity; special character assurance), agree:

- Who decides, who advises, what information is required, and timeframes.
- Develop and agree on an MOU

A simple “role discipline” checklist

The proprietor is on solid ground when actions:

- clearly relate to special character protection or proprietor property stewardship,
- use agreed processes and are consistently applied,
- strengthen board capability rather than replace it, and
- preserve the principal’s authority to lead operations.

Warning signs of boundary drift issues:

- directing staff or managing operational matters,
- informal decision-making without records or process,
- using approval rights to micromanage,
- intervening in individual enrolment matters outside preference criteria/process.
- wondering around the school talking to teachers and students

Conclusion: the proprietor’s best contribution

The proprietor’s highest value is to be a consistent guardian of special character: keeping the special character clear, resourced, and assured; maintaining property stewardship; and ensuring enrolment and employment practices genuinely support the school’s distinctiveness. When the proprietor respects boundaries and focuses on their role and responsibilities, strong on purpose, disciplined in method, special character is maintained and effective board practice supports the professional leadership of the school.