2006 Roll Return
Guidelines

Primary and Intermediate Schools

Prepared by:
Data Management Unit
Data Management and Analysis Division
Ministry of Education
Wellington

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# Overview

## Introduction

Welcome to the 2006 Roll Return Guidelines – Primary and Intermediate Schools. An equivalent booklet is available for secondary, area (composite) and special schools.

The Ministry of Education carries out statistical collections (referred to throughout this document as roll returns) from all schools in New Zealand at 1 March and 1 July each year, in line with the statutory requirements as detailed in the Education Act 1989.

The Ministry uses the data you provide through these collection exercises in a number of ways: to fund and staff schools, to support policy analysis, development and decision making, to monitor the outcomes of the New Zealand education system, and for national and international reporting purposes.

## Purpose of these Guidelines

We understand that supplying this information is not always easy and that it requires your time and effort, hence these guidelines.

They are designed to support all schools through the roll return process, irrespective of whether your school:

- uses a computerised Student Management System (SMS) to produce some of the required roll return tables; or
- completes your roll returns by hand without the aid of a computer/computer system.

These guidelines set out the information we believe you need to help you provide accurate, correctly-formatted roll return data that truly reflects what is happening in your school.

We hope they will prove useful and that they will help to explain why we ask you to provide the information we do.

## Feedback

We are keen to make these guidelines as useful as possible for you and your school. To that end we are interested in receiving feedback from you about them.

Please email any comments to: desiree.patterson@minedu.govt.nz
Why do we collect this data?

The data collected through the roll returns is required for the management of educational programmes, for funding purposes, to support policy analysis, development and decision making, and for national and international reporting purposes.

Information privacy

Information relating to individual students and staff members employed by the school board will be treated as confidential by the Ministry of Education, and access to the information will be restricted to a small number of authorised personnel working within the Ministry.

Release of this information outside the Ministry will only occur in aggregate statistical form, and no information which identifies individuals will be made available to any individual, group, or agency outside the Ministry.

While the names of Board of Trustees members remain public information, any other information collected about individual members will be treated in a similar manner to information collected about students and employees.

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</table>
## What is new for 2006 roll returns?

### Tuition weeks for overseas students

Tuition weeks is a new data field for international students. A new column has been added to tables M2 and J2 in Question 1 of the March and July returns to record the number of tuition weeks.

#### Definition of tuition weeks

Tuition weeks is defined as the total number of weeks in the academic year that a foreign fee-paying student (FF) or New Zealand Agency for International Development (NZAID) student (FE) is enrolled at school for academic tuition.

### MOE Year Level

Year of Schooling has been changed to ‘MOE Year Level’

We are aware that schools often assign an academic level to students that is different from the year level defined by the MOE. To prevent confusion between the two, a year level in the roll return context will be known as MOE Year Level.

This name change has been motivated by the need for Audit, Resourcing and Data Management at the Ministry of Education to align their terminology. Ministry auditors refer to MOE Year Level when they visit schools. Future Resourcing Handbooks will also refer to MOE Year Level.

#### Assigning MOE Year Level

The method for assigning the MOE Year Level is exactly the same as it has been for Year of Schooling up to now. This is described on page 20 of this booklet.

### Zoning status

The instructions for this field have been revised to simplify the coding of zoning status for each student.

MOE policy on property provision for out of zone students came into effect on 1 January 2003. Up to now, if a school’s enrolment scheme began before this date, coding of students’ in or out of zone status has been required only for students enrolled after this date.

### Coding students’ zoning status

From 2006, the requirement to refer to this date will no longer be necessary. Therefore schools may:
- code students’ zoning status from the date their school’s enrolment scheme took effect; or
- leave students’ zoning status as per last year’s guidelines.

*Continued on next page*
What is new for 2006 roll returns?, continued

<table>
<thead>
<tr>
<th>Exchange students</th>
<th>Schools will be asked to identify which type of exchange scheme exchange students belong to. This will be reported manually on the roll returns in the overseas students question.</th>
</tr>
</thead>
<tbody>
<tr>
<td>International students</td>
<td>The dependent children of any foreign student who is enrolled in any Doctor of Philosophy (PhD) programme at a New Zealand University are to be treated as domestic students when enrolling at a New Zealand school.</td>
</tr>
<tr>
<td>Māori language funding</td>
<td>From 2006, all students enrolled in Māori-medium education (Levels 1–4) will receive Māori language funding. This is a change from previous years when only Māori students received funding for this. Please refer to Education Circular 2005/18. This can be accessed on the Ministry’s website: <a href="http://www.minedu.govt.nz/goto/circulars">www.minedu.govt.nz/goto/circulars</a></td>
</tr>
<tr>
<td>Māori-medium roll predictions</td>
<td>From 2006, schools will be asked to provide predicted rolls by MOE Year Level for all four funded levels of Māori language learning (Levels 1–4b).</td>
</tr>
</tbody>
</table>
## Student records

<table>
<thead>
<tr>
<th>Purpose</th>
</tr>
</thead>
<tbody>
<tr>
<td>This chapter deals with information that is required for roll return purposes about your current students, and about students who leave your school. If your school does not use a computerised SMS, you will need to obtain the relevant data and find other ways to store the information and retrieve it when required for the roll returns.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Enrolment forms</th>
</tr>
</thead>
<tbody>
<tr>
<td>The Data Management Unit strongly advises that the easiest way for all schools to collect most of the required student data is through your enrolment forms. These should be designed so that you can collect the information required for roll return purposes when a student enrols at your school, alongside any other data your school might need. The student data required for roll returns is set out on the next page.</td>
</tr>
</tbody>
</table>
To be able to complete your roll return, your school must collect the enrolment data listed below for each student. The data items are listed below in alphabetical order. For schools using a computerised Student Management System (SMS), please note this data will reflect the data entry fields in your SMS.

The data items are described in more detail in the following pages.

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<td>Date of birth</td>
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<td>Early Childhood Education Participation (for Year 1 students only)</td>
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<td>Ethnicity (up to three ethnic groups)</td>
<td>Revised codes</td>
<td>12</td>
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<tr>
<td>Fee for tuition for foreign fee-paying and NZAID (FF and FE) students</td>
<td>Revised process</td>
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<tr>
<td>Gender</td>
<td></td>
<td>15</td>
</tr>
<tr>
<td>Iwi affiliation (up to three Iwi)</td>
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<td>Leaving date</td>
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<td>Māori Language Learning Index</td>
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<td>Revised title</td>
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<tr>
<td>ORRS status</td>
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<td>22</td>
</tr>
<tr>
<td>Pacific-medium – Language and Level</td>
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<td>Previous school</td>
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</tr>
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<td>Reason for leaving</td>
<td>Additional options</td>
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<tr>
<td>School ID</td>
<td></td>
<td>25</td>
</tr>
<tr>
<td>Start date (for students up to Year 8)</td>
<td></td>
<td>10</td>
</tr>
<tr>
<td>Student ID</td>
<td></td>
<td>25</td>
</tr>
<tr>
<td>Student name</td>
<td></td>
<td>25</td>
</tr>
<tr>
<td>Tuition weeks (for foreign fee-paying and NZAID students)</td>
<td>New data field</td>
<td>25</td>
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<td>Changes for Exchange students</td>
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</tr>
<tr>
<td>Zoning status (if applicable)</td>
<td>Revised instructions</td>
<td>29</td>
</tr>
</tbody>
</table>
## Country of citizenship

### Why do we collect this?

This information is used for:
- compiling statistics about overseas students studying in New Zealand
- determining whether a student born outside New Zealand is entitled to be funded as a domestic student.

### Definition of domestic student

A domestic student is defined in the Education Act 1989. The definition includes persons who are:
- New Zealand citizens (including those born in the Cook Islands, Tokelau or Niue)
- New Zealand permanent residents
- Citizens of Australia residing in New Zealand
- Dependent children of:
  - Diplomatic staff
  - Refugees
  - Persons with New Zealand work permits
  - Persons with Commonwealth scholarships
  - Any foreign student who is enrolled in any Doctor of Philosophy (PhD) programme at a New Zealand University.

### Citizenship and residency status

To ensure that students are correctly identified as domestic students, schools should check the citizenship and residency status of all students when they enrol. The Ministry strongly recommends that schools attach documentation confirming students’ citizenship or residency status to their enrolment forms.

The following documents are suitable for confirming a student’s citizenship or residency status:
- Birth Certificate
- Certificate of Naturalisation
- Passport with details of the student’s residency status or a valid student visa
- Immigration Service documentation of refugee status.

Please ensure you sight and retain copies of original or certified true copies of original documents rather than photocopies.

### Codes

A list of country of citizenship codes can be obtained from the Ministry of Education website [www.minedu.govt.nz/goto/schoolrollreturns](http://www.minedu.govt.nz/goto/schoolrollreturns)

### Warning

Do not confuse country of citizenship with ethnicity.

Country of citizenship relates to a student’s nationality and the country of which s/he holds a passport, whether the student was born into that nationality or whether it was adopted at some later date. It may be, but does not necessarily have to be, the same as the country of origin, or the country of birth.
# Dates (DoB, Start date, Enrol date)

<table>
<thead>
<tr>
<th><strong>Date of birth</strong></th>
<th>This is self-explanatory.</th>
</tr>
</thead>
</table>

<table>
<thead>
<tr>
<th><strong>Start date</strong></th>
<th>This is the date the student first started attending any school. For the majority of students this is between their fifth and sixth birthdays.</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>This date is used to determine the correct MOE Year Level for primary students and therefore must be recorded even if the student first started schooling at a different school.</td>
</tr>
<tr>
<td></td>
<td>Where the start date is unknown (e.g. for refugee children or students who have been home-schooled), the date of the student’s sixth birthday should be entered.</td>
</tr>
<tr>
<td></td>
<td>Start date applies to students up to Year 8. It is not compulsory for secondary school students.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th><strong>Enrol date</strong></th>
<th>This is the date of first attendance at your school.</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>There are two scenarios:</td>
</tr>
<tr>
<td></td>
<td>• A student may be enrolled some time before he/she begins attending the school.</td>
</tr>
<tr>
<td></td>
<td>• A student may have transferred to your school from another school.</td>
</tr>
<tr>
<td></td>
<td>The enrol date to be recorded on the student’s record is the date of first attendance for tuition at your school. This will help to ensure that only those eligible are counted on the roll returns.</td>
</tr>
</tbody>
</table>
Early Childhood Education participation (for Year 1 students)

**Why do we collect this?**
This information is used to measure the participation of children in Early Childhood Education services.

**Enrolment form**
School administrators need to identify whether or not Year 1 students attended any form of Early Childhood Education (ECE) on a regular basis immediately before starting school.

This information should be included on enrolment forms for:
- new entrants
- Year 1 students transferring from another school.

The response on the enrolment form must not be left blank. Instead, one of the following categories must be selected:
- Never attended an Early Childhood centre
- Attended Kohanga Reo
- Attended Kindergarten, Playcentre, Education and Care or Home-based Service
- Attended Playgroup or Pacific Island EC Group
- Attended ECE but type unknown
- Unable to establish whether ECE attended or not.

**July roll return**
Schools should make every effort to establish the ECE attendance of all new entrants and transferred Year 1 students.

The last category ‘Unable to establish …’ should be accepted only very rarely, e.g. in cases of fostered children, or where caregivers do not speak English. In the past, many schools reported unacceptably high numbers in this category.

For the July roll return, only ECE tables with minimal or nil children coded as ‘Unable to establish...’, will be accepted by the Data Management Unit.
## Ethnicity

### Why do we collect this?
This information is used to monitor the participation, retention and achievement of different ethnic groups in the New Zealand population.

### Definition
Statistics New Zealand defines Ethnicity as: “the ethnic group or groups that people identify with or feel they belong to. Ethnicity is a measure of cultural affiliation, as opposed to race, ancestry, nationality or citizenship. Thus, ethnicity is self-perceived and people can affiliate with more than one ethnic group.”

School enrolment forms should allow for students to self-identify or to be identified by their parents/guardians as belonging to up to three ethnic groups.

### Changes to the codes
Codes for ethnicity have changed from alpha codes to numeric codes. These changes were implemented to align Ministry codes with Statistics NZ codes. Schools may not notice the difference in their SMS because they may not see the codes when they enter data.

The ethnicity codes are listed in the table on the next page.

**Note:**
- Taiwanese has been removed from the list.
- ‘Not stated’ is a new option.

### Warning
Do not confuse ethnicity with country of citizenship.

### Ethnic groups for roll returns
To translate ethnicity to an ethnic group for specific tables in the roll returns, use the table on the next page. The examples below illustrate.

**Example 1:** A student who has identified with the groups Indian and British/Irish should be coded as both 431 and 121 on their individual student record. S/he would be reported as Indian in tables J5, J6 and J8 but as a leaver s/he would be reported in SL1 and SL2 in the Asian group.

**Example 2:** A student who has identified with groups Māori and NZ European/Pākehā should be coded as both 211 and 111 on their individual student record. S/he would be reported as Māori in all tables requiring ethnicity.

**Example 3:** A student who has identified with the groups NZ European/Pākehā and Samoan should be coded as 111 and 311 on their individual student record. S/he would be reported as Samoan in all tables requiring ethnicity except the School Leaver tables (SL1 & SL2). When the student leaves school s/he should be reported as Pasifika/Pacific Island group.

**Note:** School leaver data applies to secondary-aged students only.
For the purposes of the roll returns, students must be reported in one ethnic group only. The Ministry uses the same system of priority recording that is used by Statistics New Zealand in the 2001 census.

To determine which ethnic group to report for a particular student, **start at the top** of the ethnicity list below and use the first ethnicity that applies to this student, then look to the right hand columns for the ethnic group for the relevant roll return tables.

**Note:** The SL tables (third column) refer to secondary-aged school leavers.

<table>
<thead>
<tr>
<th>Code</th>
<th>Ethnicity list</th>
<th>Report students in one group only</th>
<th>Report students in one group only</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td>Ethnic group Tables: J5, J6, J7</td>
<td>Ethnic group Tables: SL1, SLA, SL2</td>
</tr>
<tr>
<td>211</td>
<td>New Zealand Māori</td>
<td>NZ Māori</td>
<td>NZ Māori</td>
</tr>
<tr>
<td>351</td>
<td>Tokelauan</td>
<td>Tokelauan</td>
<td></td>
</tr>
<tr>
<td>361</td>
<td>Fijian</td>
<td>Fijian</td>
<td></td>
</tr>
<tr>
<td>341</td>
<td>Niuean</td>
<td>Niuean</td>
<td></td>
</tr>
<tr>
<td>331</td>
<td>Tongan</td>
<td>Tongan</td>
<td>Pasifika</td>
</tr>
<tr>
<td>321</td>
<td>Cook Island Māori</td>
<td>Cook Island Māori</td>
<td></td>
</tr>
<tr>
<td>311</td>
<td>Samoan</td>
<td>Samoan</td>
<td></td>
</tr>
<tr>
<td>371</td>
<td>Other Pacific peoples</td>
<td>Other Pasifika</td>
<td></td>
</tr>
<tr>
<td>411</td>
<td>Filipino</td>
<td></td>
<td>Southeast Asian</td>
</tr>
<tr>
<td>412</td>
<td>Cambodian</td>
<td></td>
<td>Asian</td>
</tr>
<tr>
<td>413</td>
<td>Vietnamese</td>
<td></td>
<td></td>
</tr>
<tr>
<td>414</td>
<td>Other Southeast Asian</td>
<td></td>
<td></td>
</tr>
<tr>
<td>431</td>
<td>Indian</td>
<td>Indian</td>
<td></td>
</tr>
<tr>
<td>421</td>
<td>Chinese</td>
<td>Chinese</td>
<td>Other Asian</td>
</tr>
<tr>
<td>441</td>
<td>Sri Lankan</td>
<td></td>
<td></td>
</tr>
<tr>
<td>442</td>
<td>Japanese</td>
<td></td>
<td></td>
</tr>
<tr>
<td>443</td>
<td>Korean</td>
<td></td>
<td></td>
</tr>
<tr>
<td>444</td>
<td>Other Asian</td>
<td></td>
<td></td>
</tr>
<tr>
<td>511</td>
<td>Middle Eastern</td>
<td></td>
<td>Other (e.g. South American, African)</td>
</tr>
<tr>
<td>521</td>
<td>Latin American/Hispanic</td>
<td></td>
<td></td>
</tr>
<tr>
<td>531</td>
<td>African</td>
<td></td>
<td>Other</td>
</tr>
<tr>
<td>611</td>
<td>Other ethnicity</td>
<td></td>
<td></td>
</tr>
<tr>
<td>999</td>
<td>Not stated</td>
<td></td>
<td></td>
</tr>
<tr>
<td>128</td>
<td>Australian</td>
<td></td>
<td></td>
</tr>
<tr>
<td>121</td>
<td>British/Irish</td>
<td></td>
<td></td>
</tr>
<tr>
<td>127</td>
<td>German</td>
<td></td>
<td></td>
</tr>
<tr>
<td>122</td>
<td>Dutch</td>
<td></td>
<td></td>
</tr>
<tr>
<td>123</td>
<td>Greek</td>
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<td>South Slav (formerly Yugoslav groups)</td>
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<td>126</td>
<td>Italian</td>
<td></td>
<td></td>
</tr>
<tr>
<td>129</td>
<td>Other European</td>
<td></td>
<td></td>
</tr>
<tr>
<td>111</td>
<td>NZ European/Pākehā</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
**Fee for Tuition (for FFP and NZAID students)**

**Why do we collect this?**
This information will be used to calculate the Export Education Levy for foreign fee-paying students.

**What is to be reported?**
- In the Overseas Students question in both the March and July roll returns, schools must report tuition fees charged (including GST) for **this academic year**. (i.e. 27 January 2006 to 15 December 2006).
- The fee charged for tuition is required for foreign fee-paying and NZAID students.
- The fee to be reported is the amount charged for the academic year (or proportion of the year for which the student is enrolled), **not** just that portion of the fee that has been paid to date. For students paying term by term this means the **liable fee** for their **expected enrolment period** in the 2006 academic year, even though they may have yet to pay the total fee.
- For students enrolling over more than one academic year, the tuition fee must be divided proportionately into each academic year and the **2006** portion only reported on the 2006 returns.
- Schools providing scholarships to foreign students must still report the full tuition costs so that the Ministry can calculate the Export Education Levy correctly.
- The amount must be entered in New Zealand dollars.

**Foreign/International Student Levy**
This applies to state schools.
State schools that enrol foreign fee-paying students are required under the Education Act to pay the International Student Levy. This is set at $900 for each foreign fee-paying student enrolled at a state school for a full year. This levy does not apply to NZAID students.

The International Student Levy is deducted from state schools’ Operations Grants based on the number of foreign-fee paying students recorded on the 1 March roll and any additional students recorded on the 1 July roll return.

**Short-stay international students**
Because a large number of international students now attend state schools for short periods of time, the Minister of Education has agreed to change the levy collection method so that the levy amount is calculated on a weekly basis.

For short-stay international students enrolling in 2006 who will not be included on either the 1 March or 1 July roll return, the payment of the levy must be done on the RS15 form, which has been altered to include **Tuition Weeks** so that accurate payments can be made.

The RS15 form can be downloaded from the Ministry’s website at this link: [http://www.minedu.govt.nz/goto/resourcingforms](http://www.minedu.govt.nz/goto/resourcingforms)
Fee for Tuition (for FFP and NZAID students), continued

<table>
<thead>
<tr>
<th>Tuition weeks</th>
<th>From 2006, the roll returns will collect the number of weeks the student is enrolled for (tuition weeks). This will allow for the exact deduction of the International Student Levy and therefore there will no longer be a need to refund the levy for international students who enrol for less than a year.</th>
</tr>
</thead>
</table>
| Export Education Levy | The Export Education Levy is payable for all foreign fee-paying students studying in New Zealand.  
The Export Education Levy is deducted from the Operations Grants of state integrated schools, and from the Subsidy Grants of fully registered private schools.  
State schools do not make any additional payment for the Export Education Levy because it is deducted by the Ministry of Education from the Foreign Student Levy paid by these schools.  
For further information on the Foreign Student Levy and the Export Education Levy, please refer to Circular 2003/5 or the Funding, Staffing and Allowances Handbook, which is available on the Ministry of Education's website at http://www.minedu.govt/goto/resourcinghandbook |

Full-time Equivalent (FTE)

| What is FTE? | The FTE field is used to determine a student’s attendance status, i.e. whether the student is reported as full-time or part-time. Resourcing of schools is based on the full-time equivalent roll count.  
All students in Years 1–8 and all students aged under 16 in Year 9 or above must be counted as one full-time equivalent student (i.e. have a FTE = 1.0). SMSs should default these students to full-time. Part-time students must be 16 years of age or older. |

Gender

| Gender | A student is identified as male or female. |
Iwi affiliation

Why do we collect this?

Iwi authorities and runanga are increasingly interested in the educational participation and achievement of their children. Collecting Iwi affiliation information allows Iwi, schools and the Ministry to understand the current opportunities and challenges and to focus effort in the areas of greatest need.

While neither the March nor July roll returns include a specific question about Iwi affiliation, the Data Management Unit has collected the data, via alternative collection vehicles, from a number of schools across the country. Where available, that data has proved a rich source of information for the Ministry and Iwi. We hope the richness will improve over time as more and more data becomes available about more and more students.

You can find more detailed information about the collection of Iwi affiliation data on the Ministry of Education website www.minedu.govt.nz under Māori Education, Research and Statistics.

Background

We asked schools to start recording student Iwi affiliations for the first time in 2003. Specifically, we asked all schools with computerised SMSs to record up to three Iwi affiliations for students enrolling from the beginning of 2003, including any who transferred in from other schools.

The position for 2006 remains the same as for 2003 – i.e. there is no specific Iwi affiliation question on either of the 2006 roll returns. But in 2006, as in 2003, it is likely we will be collecting the data from (selected) schools via alternative means – usually through collecting the SMS-generated file of individual student data. Therefore, we ask that you continue recording this information in your SMSs for all students who have enrolled in your school since January 2003.

What should be recorded?

Iwi affiliation is based on ancestry. Some people will have an Iwi affiliation but, for various reasons, feel unable to identify as Māori. It is important therefore that the opportunity to identify Iwi affiliations is provided for all students – Māori and non-Māori alike.

If you have not already done so, you will need to modify your school’s enrolment form to include a write-in question asking for iwi affiliations of all students, as in the example below:

<table>
<thead>
<tr>
<th>Does the student have an affiliation with an(y) Iwi?</th>
<th>If ‘YES’ please complete details below</th>
</tr>
</thead>
<tbody>
<tr>
<td>Please enter the name(s) of the student’s Iwi where the student identifies as belonging to one or more Iwi.</td>
<td>Iwi:</td>
</tr>
<tr>
<td>Up to three Iwi affiliations may be entered for the student.</td>
<td>Rohe (Iwi home area):</td>
</tr>
<tr>
<td>If the student has an Iwi affiliation, but does not know the name of their Iwi, please enter ‘Don’t know’.</td>
<td>Iwi:</td>
</tr>
</tbody>
</table>

Continued on next page
Iwi affiliation, continued

<table>
<thead>
<tr>
<th>Iwi affiliation reference card</th>
</tr>
</thead>
<tbody>
<tr>
<td>As part of the July 2005 roll return package, the Data Management Unit provided all schools, for reference purposes, with a laminated sheet listing the Statistics New Zealand standard classification of Iwi and their codes. The classification is also available on the Ministry of Education website <a href="http://www.minedu.govt.nz/goto/schoolrollreturns">www.minedu.govt.nz/goto/schoolrollreturns</a>.</td>
</tr>
<tr>
<td>School administrators in schools with computerised SMSs will need to translate the Iwi affiliations given in words on students’ enrolment forms into the codes given in the Statistics New Zealand standard classification. Administrators should enter the appropriate codes for each student into their SMSs.</td>
</tr>
<tr>
<td>If you would like further copies of the Iwi reference card, or have any queries about the collection or coding of Iwi data, please send an email to <a href="mailto:iwi.data@minedu.govt.nz">iwi.data@minedu.govt.nz</a> for assistance.</td>
</tr>
</tbody>
</table>

Leaving Date (date of last attendance for tuition)

<table>
<thead>
<tr>
<th>Leaving Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>When a student leaves your school, the date of last attendance for tuition is to be recorded either through your SMS (if your school uses one for roll return purposes) or other record management system.</td>
</tr>
</tbody>
</table>
Māori Language Learning Index

This records the highest level of Māori language learning for each student involved. This information is used for the resourcing of Māori language and immersion programmes and to measure participation in these programmes. Schools receive funding for Māori students in Levels 1–4b.

Listed below are the categories that appear in the roll return. One of these categories must be allocated to each student involved in Māori language learning. Please make sure you **update the data for each student before each roll collection** to capture the correct level at which students are learning. This is particularly important for students changing levels between March and July.

Māori language learning has three degrees of involvement:
- Māori-medium – curriculum is delivered in Māori (i.e. curriculum subjects are taught in Māori)
- Te Reo Māori – as a separate subject
- Taha Māori.

Within these degrees there are six levels, which must be reported on roll returns. They are described below.

The whole curriculum is delivered either:
- in Māori only (immersion); or
- in both Māori and English (bilingual).

This covers four levels.

<table>
<thead>
<tr>
<th>Level</th>
<th>Curriculum is taught in Māori</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>100% of time, i.e. complete immersion (25 hours per week) or 81–100% of total time, i.e. for more than 20 and up to 24.75 hours per week</td>
</tr>
<tr>
<td>2</td>
<td>51–80% of total time, i.e. for more than 12.5 and up to 20 hours per week</td>
</tr>
<tr>
<td>3</td>
<td>31–50% of total time, i.e. for more than 7.5 and up to 12.5 hours per week</td>
</tr>
<tr>
<td>4a</td>
<td>12–30% of total time, for more than 3 and up to 7.5 hours per week (i.e. more than 70% of instruction is in English).</td>
</tr>
</tbody>
</table>

Continued on next page
Māori Language Learning Index, continued

**Te Reo Māori**  
Students learn Māori language as a separate subject.  
This covers two levels.

<table>
<thead>
<tr>
<th>Level</th>
<th>Te Reo Māori is taught as a separate subject:</th>
</tr>
</thead>
<tbody>
<tr>
<td>4b</td>
<td>At least 3 hours per week</td>
</tr>
<tr>
<td>5</td>
<td>Less than 3 hours per week</td>
</tr>
</tbody>
</table>

Some schools that offer Te Reo Māori as a separate subject have a policy of rotating students through the Te Reo Māori programme – perhaps for a term at a time. In such cases, the roll return should record only the number of students involved in the programme on roll count date (1 March 2006 and 1 July 2006), not the total number of students involved in the programme for the whole year.

**Taha Māori**  
Students learn Māori songs, greetings and simple words.  
This covers just one level.

<table>
<thead>
<tr>
<th>Level</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>6</td>
<td>Maori songs, greetings and simple words</td>
</tr>
</tbody>
</table>

**Extra category in SMSs**  
For schools using computerised SMSs, your SMS should have an additional category for students who are not involved in any Māori language learning.

**Important**  
The Māori-medium education table in the roll returns provides two rows for each level:

- The first row should contain the total number of students (Māori and non-Māori) involved in that level of Māori language learning.
- The second row should contain the number of Māori students included in the row above.

Even if all your students are Māori, and all are involved in Māori-medium Education, you must still complete the second row in each level.

**Funding for Māori-medium in 2006**  
Funding for Māori-medium and Te Reo Māori programmes has changed. In 2006, all students who are enrolled in Māori-medium education will receive funding, not just Māori students.

This funding is adjusted when the actual numbers of students in these programmes become available from the next March return.

Please refer to Education Circular 2005/18. This can be accessed on the Ministry’s website:  [www.minedu.govt.nz/goto/circulars](http://www.minedu.govt.nz/goto/circulars)
MOE Year Level (previously Year of Schooling)

Name change
In the past there has been confusion between:

• Year of Schooling as required for roll returns; and
• Year of Schooling as a way of allocating a class or academic level for a student within the school.

To prevent further confusion, year levels in the roll return context will be known as MOE Year Level.

Definition
MOE Year level measures the number of years of schooling a student has received. It provides the Ministry of Education with a method of counting students for resourcing purposes which is independent of the way schools are organised or the particular programme of study a student may be undertaking.

What it is not
MOE Year Level is not a measure of a student’s academic level. Where a student fits academically is at the principal’s discretion.

Thus a student’s academic Year of Schooling may well be different from his/her MOE Year Level.

To calculate MOE Year Level
MOE Year Level for most students is based on the date they first ever began schooling. This is their Start date (Refer to page 10).

Follow these steps to determine a student’s MOE Year Level:

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Check the student’s Start date – i.e. the date s/he started school for the very first time.</td>
</tr>
<tr>
<td>2</td>
<td>Use this date to calculate the MOE Year Level:</td>
</tr>
<tr>
<td></td>
<td>If ..</td>
</tr>
<tr>
<td></td>
<td>Start date is on or before 1 July</td>
</tr>
<tr>
<td></td>
<td>Start date is after 1 July</td>
</tr>
<tr>
<td>3</td>
<td>The student retains this MOE Year for the rest of the calendar year.</td>
</tr>
<tr>
<td>4</td>
<td>In January of the next year every student’s MOE Year increases by one.</td>
</tr>
</tbody>
</table>

Misconceptions
MOE Year Level is not based on:

• A student’s fifth birthday. Students may start school at any time between their fifth and sixth birthdays.
• A school’s internal system of promoting students to the next academic level in April or May.
• A student’s academic level, even if s/he has been accelerated or held back for whatever reason.
MOE Year Level (previously Year of Schooling), continued

Examples of MOE Year Level calculation

**Example 1:** Jamie started school for the first time on 15 May 2004. His MOE Year was Year 1 for the rest of 2004. In January 2005 he went up to Year 2. In all of 2006 he will be in Year 3.

**Example 2:** Mary started school for the first time on 2 July 2004. Her MOE Year was Year 0 for the rest of 2004. In January 2005 she went up to Year 1. In all of 2006 she will be in Year 2.

**Example 3:** Susan transferred to this school from another school on 10 August 2005. Her start date (at her previous school) was 5 June 2003. Therefore in 2006 her MOE Year is Year 4, having started school for the very first time as a Year 1 in 2003.

**Example of incorrect calculation:** Susan (above) started at this school on 10 August 2005. If using her enrol date (at this school) instead of her start date (at her previous school), she would register as MOE Year Level 1 in 2006. This is not correct.

How SMSs calculate MOE Year Level

SMSs calculate a student’s MOE Year from the Start date entered for this student.

When entering this information for students who have transferred from other schools, administrators must take care to enter the correct date in that field – i.e. the date the student started school for the first time (at the other school), not the first date of attendance at this school.

Entering the wrong date will result in the SMS reporting the student in the wrong MOE Year.

Students starting school after age six

Students who start school after the compulsory starting age of six, such as migrant children and children who have been home-schooled, will be given the same MOE Year Level as the majority of students of the same age.

Re-setting MOE Year Level

The MOE Year Level for a student may be re-set at Year 7, Year 8 and Year 9 levels only:

- Students in their final two years of primary and intermediate schooling (Form 1 and Form 2) must have their MOE Year Level set at Year 7 and Year 8 in order to generate appropriate funding and staffing for technology.
- All students in their first year of secondary schooling will be classified in Year 9.
## ORRS Status

<table>
<thead>
<tr>
<th>Definition</th>
<th>ORRS describes the level of resourcing for special needs students identified in the Ongoing and Reviewable Resourcing Schemes (ORRS). It is recorded on your SMS as N, H or V (Non-ORRS, High needs, Very high needs).</th>
</tr>
</thead>
<tbody>
<tr>
<td>What is it used for?</td>
<td>Although this data is not currently collected on roll returns, it remains a requirement for school SMSs so that this information can be recorded for a school’s own purposes.</td>
</tr>
<tr>
<td>ORRS students older than 14</td>
<td>Special needs students are entitled to attend primary schools until the end of the year in which they turn 21. In the past this has caused difficulties for schools preparing their roll return tables by SMS. From 2006, if special needs students have their ORRS status recorded (as H or V), this will ensure that they can be included on the SMS roll return tables, without causing an error message. <strong>Note:</strong> It would be helpful to Data Management staff, if a note could be added to the SMS table indicating that these older students are ORRS students.</td>
</tr>
</tbody>
</table>
Pacific-medium – Language and Level

**Definition**
In Pacific-medium education the curriculum is delivered either:
- in a specified Pacific language only (immersion); or
- in both a specified Pacific language and English (bilingual).

**Why do we collect this?**
Data on the numbers of students involved in Pacific-medium education is used to measure the extent to which Pacific-medium education is being provided in schools. This assists in policy development work.

**Pacific languages**
Pacific languages for which data is collected are:
- Cook Island Māori
- Fijian
- Niuean
- Samoan
- Tokelauan
- Tongan
- Other Pacific languages

**Pacific-medium education**
Pacific-medium education may be reported at four levels. Students must be reported once only, at the highest level of learning.

<table>
<thead>
<tr>
<th>Level</th>
<th>Curriculum is taught in the specified Pacific language:</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>81–100% of total time, i.e. for more than 20 and up to 25 hours per week</td>
</tr>
<tr>
<td>2</td>
<td>51–80% of total time, i.e. for more than 12.5 and up to 20 hours per week</td>
</tr>
<tr>
<td>3</td>
<td>31–50% of total time, i.e. for more than 7.5 and up to 12.5 hours per week</td>
</tr>
<tr>
<td>4</td>
<td>12–30% of total time, for more than 3 and up to 7.5 hours per week (i.e. more than 70% of instruction is in English)</td>
</tr>
</tbody>
</table>

**Extra level in SMSs**
The SMSs allow for an extra level for students not involved in Pacific-medium education.
Previous School

Why do we collect this?
This information is used to assist in determining the catchment area of a school. This is used in projecting rolls and in property planning.

Intermediate schools only
This information is asked for in the March roll return for intermediate schools only.
This data is required for Regular Year 7 students.
This data is not required for NZAID and FFP students.

School numbers
Schools completing this question manually must include the MOE number of the relevant schools.
A list of school numbers and names can be obtained from the Ministry of Education website, www.minedu.govt.nz/goto/schoolrollreturns

Reason for Leaving

Purpose
Reason for Leaving applies mainly to secondary-aged students, but primary and intermediate schools with SMSs will need to enter this information on their students’ records when they leave.

The reason must be from one of the following.

Note: Codes L, E and U apply to secondary-aged students only.

<table>
<thead>
<tr>
<th>Code</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>S</td>
<td>Transferred to another school in New Zealand</td>
</tr>
<tr>
<td>O</td>
<td>Left to go or return overseas</td>
</tr>
<tr>
<td>D</td>
<td>Deceased</td>
</tr>
<tr>
<td>L</td>
<td>Left school (i.e. to seek employment or for post-school education and training)</td>
</tr>
<tr>
<td>E</td>
<td>Granted early exemption to leave school (applies to those under 16 years)</td>
</tr>
<tr>
<td>U</td>
<td>Student under the age of 16 whose destination is unknown</td>
</tr>
<tr>
<td>X</td>
<td>Expulsion or exclusion</td>
</tr>
<tr>
<td>H</td>
<td>Transferred to home-schooling</td>
</tr>
</tbody>
</table>
School ID

School ID
Ministry of Education school profile number.

Student ID Number

Definition
This is a number allocated to a student by a computerised Student Management System (SMS).

Student Name

Student Name
Surname and first name are essential.

Tuition Weeks

Tuition weeks
This applies to foreign fee-paying students and NZAID students.
From 2006, the roll returns will collect the number of weeks an overseas student is enrolled for. This will allow for the exact deduction of the International Student Levy.
For further details about this levy, please refer to page 14.
Type of student

Purpose
For the purposes of Ministry of Education statistical returns, student types are defined in the following list.

Hierarchy
The list is in hierarchical order from the top down, e.g. a foreign fee-paying student who is also an adult student is coded and counted as a foreign fee-paying student.

Note: Students coded AE, AD and RA do not apply to primary and intermediate schools, but are listed below for completeness.

More detailed descriptions of all student types follow.

<table>
<thead>
<tr>
<th>Code</th>
<th>Type of Student</th>
</tr>
</thead>
<tbody>
<tr>
<td>FF</td>
<td>Foreign Fee-paying Student</td>
</tr>
<tr>
<td>FE</td>
<td>NZAID-funded Student</td>
</tr>
<tr>
<td>EX</td>
<td>Foreign Exchange Student</td>
</tr>
<tr>
<td>RE</td>
<td>Regular Student</td>
</tr>
<tr>
<td>KT</td>
<td>Kura Teina Student</td>
</tr>
<tr>
<td>AE</td>
<td>Alternative Education Student (N/A in Year 1–8 levels)</td>
</tr>
<tr>
<td>AD</td>
<td>Returning Adult Student (N/A in Year 1–8 levels)</td>
</tr>
<tr>
<td>RA</td>
<td>Adult Student (N/A in Year 1–8 levels)</td>
</tr>
<tr>
<td>EM</td>
<td>External Student</td>
</tr>
<tr>
<td>SA</td>
<td>Satellite Class Student</td>
</tr>
<tr>
<td>NA</td>
<td>Not Attending</td>
</tr>
<tr>
<td>SF</td>
<td>Separately Funded</td>
</tr>
</tbody>
</table>

Foreign Fee-paying Student (FF)
A foreign student who meets full tuition costs on their own or from funds provided to them by sponsors other than the New Zealand Ministry of Foreign Affairs and Trade.

NZAID-funded Student (FE)
A foreign student who is sponsored by the New Zealand Agency for International Development (NZAID) – a branch of the New Zealand Ministry of Foreign Affairs and Trade (MFAT).

Continued on next page
Type of student, continued

Foreign Exchange Student (EX)

An international student who is studying in New Zealand under an exchange programme approved by the New Zealand Government and is exempt from paying tuition fees.

Foreign exchange students are treated as regular students for the purposes of Ministry of Education statistical returns.

If, however, a foreign exchange student is paired with a domestic student involved in the same exchange, and the domestic student is counted on the roll, then the foreign exchange student cannot be counted.

New data required for exchange students

There is a need to identify that the exchange students in the roll returns are on approved exchange schemes; or are on an approved exchange agreement which is made directly between the New Zealand school and the Ministry of Education.

Each type of exchange student will be coded as belonging to either:

- A Government-approved Exchange Scheme (e.g. AFS, Rotary – there are 12 types); or
- A Government-approved Exchange Agreement (e.g. a school-on-school agreement. The school should have documentation to verify this).

Codes for Exchange Schemes

The codes listed below are not included in any SMSs. In 2006, this information will be completed manually in both March and July roll returns.

<table>
<thead>
<tr>
<th>Code</th>
<th>Exchange Scheme</th>
</tr>
</thead>
<tbody>
<tr>
<td>01</td>
<td>AFS Intercultural Programmes NZ Inc</td>
</tr>
<tr>
<td>02</td>
<td>ARK International Educational Travel &amp; Exchange</td>
</tr>
<tr>
<td>03</td>
<td>ASSE NZ</td>
</tr>
<tr>
<td>04</td>
<td>EF Foundation</td>
</tr>
<tr>
<td>05</td>
<td>IGO International Ltd</td>
</tr>
<tr>
<td>06</td>
<td>Kiwiana Exchange (NZ)</td>
</tr>
<tr>
<td>07</td>
<td>NZ/German Student Exchange</td>
</tr>
<tr>
<td>08</td>
<td>NZ Institute Of International Understanding</td>
</tr>
<tr>
<td>09</td>
<td>Rotary International New Zealand</td>
</tr>
<tr>
<td>10</td>
<td>STS High School Foundation</td>
</tr>
<tr>
<td>11</td>
<td>YFU New Zealand Inc</td>
</tr>
<tr>
<td>12</td>
<td>World Youth Service Society (WYSS)</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Code</th>
<th>Exchange Agreement</th>
</tr>
</thead>
<tbody>
<tr>
<td>99</td>
<td>Exchange Agreement (New Zealand school has obtained Government approval)</td>
</tr>
</tbody>
</table>
### Type of student, continued

<table>
<thead>
<tr>
<th>Type of Student</th>
<th>Description</th>
</tr>
</thead>
</table>
| **Regular Student (RE)** | A New Zealand student, or a student treated for funding and staffing purposes as a New Zealand student, who is aged less than 19 years at 1 January of the roll count year.  
**Includes:** Students in general classrooms and those in special needs units.  
**Excludes:** Foreign fee-paying students and NZAID-funded students. (Also excludes Alternative Education students, and adult students – but these do not apply to primary levels.) |
| **Kura Teina Student (KT)** | A student who attends a Kura Teina.  
A Kura Teina is a developing Kura which is attached to a recognised Kura Kaupapa Māori – referred to as the Kura Tuakana.  
This code (KT) should only be used by the Kura Tuakana to identify students at their Kura Teina, so that their SMS does **not** include them on the roll of the Kura Tuakana.  
**Note:** If the Kura Teina uses a Student Management System of its own, the students should be entered as regular students (RE) and a roll return print-out produced as for a school.  
For further information on Kura Teina students, please refer to the section on Supplementary Forms on page 42. |
| **External Student (EM)** | A student who attends your school for some courses but is enrolled at another school where the majority of instruction occurs.  
These students are counted on the roll of the school where the majority of instruction occurs, and are therefore excluded from your school’s roll returns. |
| **Satellite Class Student (SA)** | Some schools host a special school satellite class for students with special needs.  
Satellite class students count on the roll of the **special school** and are therefore excluded from the roll return of the school where the satellite class is situated. |
| **Not Attending (NA)** | This student type has been created to cater for those students not attending on the day of the roll count if there is no documentation to support their absence from school. The NA code is for temporary absence only and should not be used for students who have left the school permanently. |
| **Separately Funded (SF)** | A student in a separately funded unit and therefore excluded from the roll count. |
**Zoning status**

**Definition**

Zoning status applies to **state (non-integrated) schools** only.

In a state school which has a Ministry of Education approved enrolment scheme, a student’s zoning status indicates whether s/he resides inside or outside the school zone.

It is based on his/her address on the date of first attendance at the school. A student’s zoning status **does not change** while s/he is enrolled at your school.

**Why do we collect this?**

The information collected from the relevant schools assists the Ministry in making decisions about the provision of accommodation.

**Does my school have an enrolment scheme?**

You will probably be aware if your school has a Ministry-approved scheme, but if you are in any doubt, please contact us for clarification (see the ‘Further Information’ section at the end of this booklet for details).

Private schools do not have Ministry-approved enrolment Schemes.

If your school does not have a Ministry-approved enrolment scheme then you do not need to complete the table for question 6 in the March roll return.

**Enrolment scheme vs Zoning**

Kura Kaupapa Māori, designated character schools, special schools, and state integrated schools may have an approved enrolment scheme but they will not have a **zoning** component and therefore do not need to provide information about their enrolment scheme.

**Recording students’ zoning status**

There are three codes to record Zoning Status:

- **In zone** – student resides inside the school’s zone on the date of first attendance.
- **Out of zone** – student resides outside of the school’s zone on the date of first attendance.
- **NAPP** – Not applicable.

**Who is coded NAPP?**

The following students must be coded as NAPP (Not applicable):

- All students whose date of first attendance at your school is prior to the effective date of your school’s enrolment scheme.
- All foreign fee-paying and NZAID (formerly MFAT) students
- Students attending your school but enrolled elsewhere.

**Schools with SMSs**

Your SMS should include the facility for you to indicate whether you have an enrolment scheme. If you do not have one, your SMS should automatically default all your students to the ‘Not applicable’ (NAPP) status.
Other data requirements

Introduction
This chapter deals with information that cannot be recorded, stored or obtained from a computerised Student Management System (SMS). This includes:

- Manually completed questions in:
  - the March roll return
  - the July roll return.
- Inserts C and E.

Manually completed questions

In March
The following data items are collected in the March roll returns:

- Exchange schemes for foreign exchange students
- Peak rolls
- Teaching staff at private schools
- Teacher vacancies in state schools
- Off-site classes or units (in intermediate schools).

In July
The following data items are collected in the July roll returns:

- Exchange schemes for exchange students
- Language learning below Year 9
- Off-site classes or units (in primary schools)
- Predicted rolls for the following year.

Peak rolls

What is collected?
This question applies to state and state integrated schools only.

It collects information on the peak roll for the previous year and the month in which this peak roll was reached.

Schools are also asked to estimate their peak rolls for the current year and the next two years.

Why do we collect this?
Peak roll data assists in planning and resourcing for schools, particularly in property provision.
Teaching staff at private schools

**What is collected?**
This question applies to private schools only. It collects data about numbers of full-time and part-time teaching staff at private schools.

**Why do we collect this?**
This information, together with data from the teachers’ payroll (in state schools), gives a fuller picture of total teacher numbers and full-time teacher equivalents employed in New Zealand schools.

Teacher vacancies in state schools

**What is collected?**
This question applies to state and state integrated schools only. It collects:

- The number and type vacancies for **full-time permanent teachers**
- How many vacancies have had to be re-advertised
- How many of these the Board of Trustees is **actively seeking to fill**.  

**Note:** A board would not be considered to be ‘actively seeking to fill’ a position that is not currently being advertised because it is satisfactorily filled by a limited-term appointee.

**Why do we collect this?**
This information is used to indicate trends in staffing difficulties and inform analysis of teacher supply issues in state and state integrated schools. For example, it may identify particular geographic or subject areas in which there is a shortage of suitable teachers.

Off-site classes and units

**What is collected?**
This question applies to state and state integrated schools only. Schools are asked to list any off-site classes or special purpose units **for which their Board of Trustees has responsibility**, along with the numbers of students attending them.

- Intermediate schools are asked this question in March
- Primary schools are asked this question in July.
Language learning below Year 9

What is collected?

This question collects data on the numbers of students at primary year levels who receive language tuition (other than English or Te Reo Māori) at any time during the school year.

If a language is taught on a rotational basis (e.g. term by term), schools are asked to estimate the total number of students in each category who will receive language instruction during the school year.

Languages

Information is collected about the following languages:

<table>
<thead>
<tr>
<th>Languages</th>
<th>Languages</th>
</tr>
</thead>
<tbody>
<tr>
<td>Samoan</td>
<td>French</td>
</tr>
<tr>
<td>Cook Island Māori</td>
<td>German</td>
</tr>
<tr>
<td>Tongan</td>
<td>Japanese</td>
</tr>
<tr>
<td>Niuean</td>
<td>Spanish</td>
</tr>
<tr>
<td>Fijian</td>
<td>Russian</td>
</tr>
<tr>
<td>Tokelauan</td>
<td>Chinese languages</td>
</tr>
<tr>
<td>Other Pacific languages</td>
<td>Indonesian</td>
</tr>
<tr>
<td>Other languages</td>
<td>Other languages</td>
</tr>
</tbody>
</table>

Note: Do not include students learning Pacific languages if they have already been counted in the Pacific-medium question.

Levels of language learning

Years 1–6 students are counted together, and Years 7–8 students are counted together.

Within these two groups the categories are:

- Less than 15 hours per year
- 15 to 30 hours per year
- More than 30 hours per year.
### Predicted rolls

<table>
<thead>
<tr>
<th>Why do we collect this?</th>
<th>Predicted rolls</th>
</tr>
</thead>
<tbody>
<tr>
<td>In the July roll returns, schools are asked to predict the number of students they will have in the following year.</td>
<td>In the July roll returns, schools are asked to predict the number of students they will have in the following year. The Ministry of Education uses predicted rolls to calculate the first instalment of the funding entitlement for the year. The school’s predictions are taken into consideration when the provisional staffing roll is established. The Guaranteed Minimum Funded Staffing (GMFS) for the coming year is calculated from the provisional staffing roll. Predicted rolls are also used in future planning and forecasting.</td>
</tr>
</tbody>
</table>

| Primary schools | Primary schools are asked to predict their regular student rolls for the next **July** and to estimate their July rolls for the following two years. |
| Intermediate schools | Intermediate schools are asked to predict their regular student rolls for the next **March** and to estimate their March rolls for the following two years. |

| Māori-medium predictions | The July roll return also collects predictions of the numbers of students in Māori-medium education or learning Te Reo Māori for three or more hours per week (i.e. Levels 1–4) for the following July (primary schools) and for the following March (intermediate schools). From 2006, these roll predictions will be collected for each MOE Year, at all four levels of Māori language learning (Levels 1–4b). Please remember to state the number of Māori students included in the total at each level – i.e. complete both rows for each level. |

### Insert C – Board of Trustees

<table>
<thead>
<tr>
<th>Why do we collect this?</th>
<th>Insert C – Board of Trustees</th>
</tr>
</thead>
<tbody>
<tr>
<td>Information on Board of Trustees membership is collected from state and state integrated schools only, via a form called the Insert C. Ministry and parliamentary staff use this when they need to contact school Boards of Trustees. It is also used to obtain statistics about the composition of boards, for example, the proportions of men and women or representation of various ethnic groups.</td>
<td></td>
</tr>
</tbody>
</table>

*Continued on next page*
**Insert C – Board of Trustees**, continued

**Format of the Insert C**

Your pre-populated Insert C will be provided in both the March and July roll return packages.

It will give details (names, title, gender, board position, member type, ethnicity and, for the chairperson, contact details) for each member of your Board of Trustees – according to the latest information held by the Ministry.

**Checking your BOT details**

When checking your Board of Trustees details please:

- Ensure full and correct details for all current (at roll count dates) board members are included. Specifically we need: gender and ethnicity details, board positions, board member types and start dates.
- Cross out the names of former trustees who are no longer members of the Board on roll count dates.
- Ensure that there is only one of each of the following on each Board of Trustees:
  - Principal (or Acting Principal)
  - Staff representative
  - Student representative
  - Chairperson (or Acting Chairperson).

---

**Insert E – Teacher losses**

**Why do we collect this?**

Insert E collects information on the reasons for teacher losses from state and state integrated schools only.

This information is used in teacher supply work and to identify trends and patterns of employment in the teaching workforce.

**Format of the Insert E**

The Insert E lists permanently-appointed teachers who were on the staff of the school at pay period 04 in May of the previous year and who have subsequently left the state teaching service.

Teachers on leave without pay during pay period 04 of the current year are also included as teacher losses.

**Completing the Insert E**

Schools are asked to enter the reason that best describes the reason for each teacher leaving. A list of reasons and their codes is provided on the Insert E.

There is no need to add the names of teachers who may have left this school but remain in the state teaching service.
Preparing for and completing your roll returns

Overview

This section contains the following topics:

<table>
<thead>
<tr>
<th>Topic</th>
<th>See Page</th>
</tr>
</thead>
<tbody>
<tr>
<td>Collecting, storing and checking your data</td>
<td>35</td>
</tr>
<tr>
<td>Counting students</td>
<td>36</td>
</tr>
<tr>
<td>When to expect your roll return package</td>
<td>37</td>
</tr>
<tr>
<td>What to do when you receive your roll return package</td>
<td>38</td>
</tr>
<tr>
<td>Schools using a computerised Student Management System</td>
<td>39</td>
</tr>
<tr>
<td>Schools not using a Student Management System</td>
<td>39</td>
</tr>
<tr>
<td>Consistency of data between questions (tables)</td>
<td>40</td>
</tr>
<tr>
<td>Verification and sign-off</td>
<td>41</td>
</tr>
</tbody>
</table>

Collecting, storing and checking your data

Please prepare your roll return data well ahead of the due date (10 March or 11 July). You will need to:

- collect the student enrolment and other data items as detailed in the previous sections
- enter/store this information on your school’s Student Management System (SMS) if you use one for roll returns purposes, or in whatever record management system your school uses, if not an SMS
- check carefully that the data has been correctly entered into your system
- determine which students should be counted in which parts of your roll returns – as described below.
Counting students

**Fundamental rule**

The fundamental requirement for a student to be included on a roll return is that s/he must be attending the school for tuition on the date of the roll count.

**You may also include**

You may also count on your roll return students in the following situations:

- Students who, for medical or domestic reasons, are absent on the date of the roll count, but only if the school has:
  - a medical statement
  - a statement from a social worker or counsellor
  - a letter from the parent/guardian justifying the student’s absence from school.
- Students suspended for a specified period on the date of the roll count.
- Students attending an activity centre, health camp, hospital school, or CYFS residential home on the date of the roll count.
- Students who are temporarily overseas, provided that the school has documentary evidence of their intention to return to the school, and that their absence does not exceed 15 consecutive weeks in the current school year.

**Other**

- Students who attend more than one school are to be counted on the roll of the school where the majority of instruction occurs. Boards of Trustees may exchange funds to compensate for the time a student spends at another school.
- Students who are home-schooled should not be included on roll returns.

**Schools using SMSs**

To ensure that students who do not fit the criteria for inclusion in the roll count are not counted, school administrators must select ‘Not Attending’ (NA) for the student type in their SMS.

**For further information**

Circular 1998/48 dated 30 November 1998 is still relevant and has full details on counting students. It can be accessed on the Ministry of Education’s website: www.minedu.govt.nz/goto/schoolrollreturns
When to expect your roll return package

Mail-out dates

Principals should expect to receive:

- their March roll returns package by 10 February
- their July package in the second week of June (precise mail-out dates will be published in ‘Principal View’ in the Education Gazette).

Any principals who do not receive their package within five working days of these dates should get in touch with the Data Management Unit (contact details given in the ‘Further Information’ section of this booklet).

The contents of each package are as follows:

<table>
<thead>
<tr>
<th>Contents of package</th>
<th>March</th>
<th>July</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Covering letter</strong>, setting out what action your school needs to take by when, together with some general information</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>Two blank <strong>roll return forms</strong>:</td>
<td></td>
<td></td>
</tr>
<tr>
<td>- one to be completed and returned to the Ministry</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>- the other to be completed – with identical information – and kept for your school records</td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Insert C – Board of Trustees Membership</strong></td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>For state and state integrated schools only</td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Insert E – Loss of Permanently Appointed Teachers</strong></td>
<td>X</td>
<td>✓</td>
</tr>
<tr>
<td>For state and state integrated schools only</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Any <strong>other information</strong> that might be of use to you in completing your roll return</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>Pre-paid reply envelope</td>
<td>✓</td>
<td>✓</td>
</tr>
</tbody>
</table>
## What to do when you receive your roll return package

### Read all the information

Before beginning to complete your roll return, please carefully read **all** the information provided in:

- this booklet
- the roll return covering letter
- the introductory notes included at the front of your roll return form
- the instructions provided with each question.

### Principals who delegate the completion of roll returns

We know that many school principals personally complete the March and July roll returns. Equally, we know that some principals choose to delegate the responsibility for completing them to members of their staff.

We would be grateful if principals in this position could please pass the **complete roll returns package**, along with this booklet, onto the staff member responsible for completing the returns. This will ensure they have **all** the information they require to complete the roll return correctly first time round.

Please note, however, that the **principal is still responsible** for checking the accuracy of the completed form. See the section on ‘Verification and sign-off’ on page 40.
Schools using a computerised Student Management System

Creating the MOE file

Run through the steps required by your SMS to create the text-file (.moe file) from which the roll return tables and print-outs will be generated. This includes ‘cleaning up’ any errors in individual student enrolment data.

Checking for accuracy

- Before including them in the roll return to be sent back to the Ministry, computer-generated tables must still be checked for:
  - accuracy
  - completeness
  - readability.
- In particular, please check that:
  - where a table consists of two pages, both pages are included
  - tables are printed in landscape format
  - totals are showing on the right-hand side of the page (you may need to adjust your margins before printing).
- The tables must also be checked to ensure they accurately reflect the position at the school on roll count dates.
- Particular attention must be paid to ensure consistency of data between the different tables where consistency is required (more details given in the section below).
- Complete and check the remaining questions not covered by SMS tables, that have to be completed by hand.

Note: Please do not staple or glue the SMS tables to the individual pages of the roll return. Simply staple all the tables together, and insert them into the return envelope with the roll return form and relevant inserts.

Schools not using a computerised Student Management System

Completing the roll return by hand

- Complete each roll return question manually, checking for:
  - accuracy
  - completeness
  - readability.
- The data given in each question should also be checked to ensure it accurately reflects the position at the school on the roll count dates.
- Particular attention should be paid to the consistency of data between the different tables where consistency is required. More details are given in the section below.

Please ensure that row and column totals within each table have been calculated correctly.
Consistency of data between questions (tables)

Inconsistency wastes time

Data Management Unit staff spend a great deal of time with schools that have not completed their roll returns accurately. This occurs mainly when schools complete their roll returns manually.

In particular, we receive a large number of roll returns where:

- the totals in each row and each column have been added up incorrectly (or even not added up at all)
- there are mis-matches between data in one roll return table and another.

Examples of inconsistency

Example 1: The number and gender of foreign fee-paying students in the overseas question does not match the number and gender of foreign fee-paying students reported in the main roll question.

Example 2: The total number of males in the main roll question does not match the total number of males in the age by MOE Year Level or age by ethnicity questions.

Example 3: All the tables have different male and female totals.

Save time by checking for consistency

Checking that tables are consistent with each other before you send us your roll returns will save time:

- for you at the school – because you will not have to field our follow-up phone calls
- for us at the Ministry – we will be able to process your forms more quickly.

Result: Faster processing by Data Management means that the Ministry’s Resourcing Division will be able to send out resourcing advice notices promptly.

How to achieve consistency

Please read the detailed notes and instructions for within-table and cross-table consistency which will be provided on the roll return forms:

- in the introductory notes
- at the top of each question
- on the sheet entitled ‘Tables to agree’ (see below)

and check, check and check again.

The July roll return has five tables which must agree with each other. To further explain where they must agree, the July roll return package will include a sheet entitled ‘Tables to Agree’, which uses colour coding to show which parts of each table must agree with other tables.
Verification and sign-off

- All completed roll returns and Inserts must be **verified** and **signed off** by:
  - the Principal; and  
  - the Board of Trustees’ chairperson (where relevant).
- State and state integrated schools must check and amend as required their Insert Cs (March and July).
- State and state integrated schools must complete their Insert Es (July).
- The verified and signed roll returns and inserts must be returned to the Data Management Unit by the due date (10 March 2006 and 11 July 2006 respectively) using the pre-paid reply envelopes provided.
Supplementary Forms for Kura Teina

Kura Tuakana
Primary schools which are Kura Tuakana to one or more Kura Teina will receive supplementary forms for each of their Kura Teina in their roll return packages, in both March and July.

Time line
- The principal of the Kura Tuakana must forward the supplementary forms to the Kura Teina immediately upon receiving the roll returns package.
- The Kura Teina must then complete the supplementary form and send it back to the Kura Tuakana by 5 March 2006 or 5 July 2006 respectively.
- The principal and Board of Trustees’ chairperson must check and sign the supplementary form before returning it to the Ministry of Education, along with the Kura Tuakana form, by the due date (10 March or 11 July 2006).

Completing the supplementary form
Students at the Kura Teina must not be included on the Kura Tuakana form. The questions about students in the supplementary form for Kura Teina are the same as in the Kura Tuakana form.

The Māori-medium education table in the Kura Teina’s supplementary form provides two rows for each level:
- The first row should contain the total number of students (Māori and non-Māori) involved in that level of Māori language learning;
- The second row should contain the number of Māori students included in the row above.

Even though all your students are likely to be Māori and all are involved in Māori immersion education, you must still complete the second row in each level.

Verification and sign-off
The supplementary forms for Kura Teina must be:
- completed and signed by the head teacher of the Kura Teina
- checked and signed by the principal of the Kura Tuakana
- checked and signed by the chairperson of the Kura Tuakana’s Board of Trustees.
Further information

About roll returns
For further information about completing your roll returns, or assistance with developing an enrolment form for your school, please contact:

<table>
<thead>
<tr>
<th>Désirée Patterson</th>
<th>Phone: 04 - 463 8070</th>
</tr>
</thead>
<tbody>
<tr>
<td>Data Analyst</td>
<td>Fax: 04 - 463 8088</td>
</tr>
<tr>
<td>Data Management Unit</td>
<td>Email: <a href="mailto:desiree.patterson@minedu.govt.nz">desiree.patterson@minedu.govt.nz</a></td>
</tr>
<tr>
<td>Ministry of Education</td>
<td></td>
</tr>
<tr>
<td>P O Box 1666</td>
<td></td>
</tr>
<tr>
<td>Wellington</td>
<td></td>
</tr>
</tbody>
</table>

About funding or staffing
For information about funding or staffing entitlements please contact the Resourcing Helpline on 04 - 463 8383 or email resourcing@minedu.govt.nz

About SMSs
Schools using computerised Student Management Systems should contact their SMS suppliers if they experience any difficulties using their software.

Links to useful website addresses
The following Ministry website addresses may be accessed for further information.

<table>
<thead>
<tr>
<th>Website address</th>
<th>Documents at this website</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>• March Roll Returns (available mid-February)</td>
</tr>
<tr>
<td></td>
<td>• July Roll Returns (available mid-June)</td>
</tr>
<tr>
<td></td>
<td>• Country of Citizenship codes</td>
</tr>
<tr>
<td></td>
<td>• Ethnic codes</td>
</tr>
<tr>
<td></td>
<td>• Iwi codes</td>
</tr>
<tr>
<td></td>
<td>• School numbers and names</td>
</tr>
<tr>
<td><a href="http://www.minedu.govt.nz/goto/circulars">www.minedu.govt.nz/goto/circulars</a></td>
<td>Education circulars</td>
</tr>
<tr>
<td><a href="http://www.minedu.govt.nz/goto/resourcinghandbook">www.minedu.govt.nz/goto/resourcinghandbook</a></td>
<td>Resourcing handbook</td>
</tr>
<tr>
<td><a href="http://www.minedu.govt.nz/goto/resourcingforms">www.minedu.govt.nz/goto/resourcingforms</a></td>
<td>Resourcing forms</td>
</tr>
<tr>
<td><a href="http://www.minedu.govt.nz/goto/sms">www.minedu.govt.nz/goto/sms</a></td>
<td>Information on SMS project initiatives</td>
</tr>
</tbody>
</table>
For your notes