

Montessori  
AOTEAROA NEW ZEALAND



# Montessori Aotearoa New Zealand Inc.

## *Annual Report 2023*

Published June 2024

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# Guiding Principles

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- **CREATING** an environment to foster a love of learning by enhancing freedom with responsibility, valuing creativity, and appreciating individuality.
- **NURTURING** the human spirit by respecting self, others, and the environment through connection, communication and collaboration.
- **EDUCATING** for peace by embracing diversity, celebrating the joy of discovery and practising honesty and humility.

## Vision:

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### **MAKING MONTESSORI MATTER IN AOTEAROA NEW ZEALAND**

We envision Montessori education becoming a well-known, highly respected and informed choice in Aotearoa New Zealand.

## Mission:

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### **MONTESSORI MAKES THE DIFFERENCE**

Our mission is to support and influence our community to deliver excellent Montessori programmes that enable the holistic development of infants, children and adolescents.

## Honorary Members:

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In recognition of their outstanding contribution to Montessori Aotearoa New Zealand, the following have been acknowledged with a Honorary membership.

Debbie Senoff-Langford

Patrick VanBerkel

Binda Goldsbrough (Awarded posthumously)

Dr. Nicola Chisnall (Awarded posthumously)

Beth Alcorn (Awarded posthumously)

Dave Stott

Jan Gaffney

Pam Shand

# Karakia for Montessori in Aotearoa New Zealand

Kei konei tātau hei poipoi i ngā tamariki,  
rangatahi me ngā whānau.

Kei te mihi ki a tākuta Montessori me ngā tāngata  
katoa i tautoko i Montessori i Aotearoa.

Ka āwhina tātau i ngā kaiako ka tohu i ngā tamariki  
ka ārahi i tēnei whenua rangimarie.

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We are here to nurture children, young people  
and their families.

We thank Dr Montessori and all the people who  
have sustained Montessori in New Zealand.

We support the teachers who guide the children to  
lead our country to peace.

# MANZ Strategic Aims 2020 — 2024

## Achieving the Vision and Mission...

The vision and mission of Montessori Aotearoa New Zealand are achieved through the following Strategic Aims identified in the MANZ Strategic Plan (2020-2024):

### *STRATEGIC AIM 1*

**Enabling today's learners for tomorrow's world**

### *STRATEGIC AIM 2*

**Empowering those who serve ākonga**

### *STRATEGIC AIM 3*

**Embedding biculturalism, increasing equity**

# AGM Saturday 6<sup>TH</sup> July 2024

**4.45PM - 6.00PM**

**Agenda**

- Apologies
- Confirmation of Voting Members
- Confirmation of 2023 MANZ AGM minutes
- Matters Arising from the Minutes
- MANZ President's Welcome and Introduction
- MANZ Chief Executive Report against MANZ Strategic Aims (2020-2024)
- MANZ School Membership
- Audited Performance Report
- Budget (2024)
- Nominations/Voting MANZ Council 2024
- Open Forum

2023

Annual Report

# President's Report

## Tēnā koutou, tēnā koutou, tēnā koutou katoa,

I am pleased to present to you my report for the year 2022 and touching on the current times.

It feels like no time at all since Cathy was hassling me to write my report for the 2023 AGM. I am not quite sure how it can be that a year has passed by and here I sit once again, (still requiring nudges and infinite patience from Cathy), reflecting on myself and my role as President of MANZ; on MANZ and the role it plays in supporting the provision of Montessori education in Aotearoa; and on the realities of the world in which we live; and the place where all of these converge.

Last year was all about election promises. This year, more so about election realities. In any case, our role as an organisation is to support our members to survive and hopefully thrive within the environment that we find ourselves; and to advocate for changes that can support us to better support our tamariki and those who serve them. Too often as a sector, we have found ourselves forced to focus on and make decisions that are about compliance for the sake of compliance rather than about quality and improving outcomes. It has been acknowledged that the early childhood sector in NZ is one of the most heavily regulated in the OECD yet we continue to get bombarded with news stories that speak of how our tamariki are being let down by the system.

More and more, MANZ is operating in the world of advocacy. I remember many years ago sitting around Jan Gaffney's dining-room table scratching our heads as we wondered what advocacy would look like for us as an organisation. How did we know what we should be commenting (let alone what our commentary should be) and when we found our voice, how did we get it heard? Advocacy felt like the challenging aspect to our strategic plan, the wobbly wall to our whare – that area that we knew was vitally important but also the one we never quite knew how to tackle. It felt bigger than us and apart from us in more ways than one. Should we be reacting to news about the housing crisis for example or the review of Oranga Tamariki? It is true that this is a part of advocacy and one where MANZ can and does speak up but it is also so much more than that.

Fast forward to the present day and advocacy is very much the realm in which MANZ operates. Our CE's report to Council is full of details of submissions that have been written on behalf of our membership, we speak of BIMs

(Briefings to Incoming Minister - or Ministers as is currently the case) and SRGs (Sector Reference Groups) to which MANZ is a member. To paraphrase Gandhi, advocacy is about being a part of the change we want to see in the world. It is being proactive where we can and reactive where we need to be. It is about exerting our energy where, hopefully, it can have the greatest impact.

All this has become an ever-increasing part of the day-to-day business of MANZ and one which is fulfilled so capably by our CE, Cathy Wilson. Over the last year for instance, you may have heard Cathy being interviewed on the radio or being quoted in the newspaper. She has definitely got value for money out of the media training that she did!

I have also had the privilege of sitting in on a few of the sector meetings when Cathy has been unable to attend and I can attest to the high regard to which she is held. MANZ may just be a small player but our voice carries gravitas. Where appropriate, Cathy has forged alliances that respect the unique philosophies or aspects of each member but that share the commonalities of our struggles and seek solutions that work for all through a shared approach that strengthens our position.

One example of this was through MANZ's involvement in a working group that sought to look at solutions for a funding model review that would work for both the government and the sector. This working group recruited the help of PWC to guide this work and deliver a draft terms of reference to capture the group's point of view on what should be commissioned, a narrative storyboard listing the key messages, and a high-level work plan for the next steps. Be the change you want to see.

It is hoped that by coming together we can address the challenges and offer solutions that can offer the government both short- and long-term workable wins. Too often in the past, education has seen solutions or changes to the sector that swing the pendulum too far in the other direction or only serve to highlight the distance between the practitioners, and the politicians and ministry. Key examples of this were the proposed changes to Person Responsible requirements or the surprise announcement that was to have seen two year olds included in the 20 Hours scheme. It will not always be possible to speak as one voice, but where we can the unity helps to bring strength behind our voice.



MANZ was able to contribute to this work both as a collaborator around the table but also through financially sharing in meeting the costs incurred by contracting PWC for this work. Council saw this as a worthy use for some of the cash reserves which we have built up in the past. Another exciting collaboration and investment of our reserves is through the development of a scholarship. MANZ has entered into a partnership and Memorandum of Understanding (MOU) with Te Rito Maioha. This scholarship will be available to students who undertake a Master's thesis that is focused on aspects of Montessori. Our hope is that this will generate new knowledge that would be of interest to MANZ and that would have an Aotearoa context. Support the change you want to see.

As we move into 2024, we come to the end of our strategic cycle and MANZ Council has already begun the work of developing our next strategic plan. Hang around in governance long enough (Montessori or otherwise) and you find out that each time you do strategic planning, the process and thinking around it has evolved. Each time, what you did previously no longer matches what is now deemed best practice. The process may have changed slightly or the focus or even in how you capture the plan and record the actions can all be different from plan to plan and cycle to cycle. What is hopefully not different is that each time you should come away with a plan that excites you, that guides you and drives you forward. It should ensure everyone has a shared vision and purpose and it should keep you accountable.

This year as our Chief Executive presents her report, it is against a plan which in 2024 is now in its final year of its five year cycle – and what a five years it has been. I can wholeheartedly attest that we certainly didn't plan for a lot of what turned up on our doorstep! I fondly refer to this plan as the 3Es:

- **Enabling today's learners for tomorrow's world**
- **Empowering those who serve**
- **Embedding biculturalism, increasing equity**

I will leave it to Cathy to fill you in on the progress against these aims in more detail. I would like to touch on the fact that this year your council has begun the work of dreaming and designing the next strategic plan. In fact, to those of you who are reading this before the AGM, we hope you will take the time to come along to our session on this plan earlier in the afternoon where we will be seeking your feedback. There are many ways to provide this feedback and help shape the future of your association so that we can best serve you to support the tamariki and whanau that you serve.

Once again, we are very excited about this plan which could also be referred to as the 3Es. In the writing of it, we felt the inspiration from Dr. Montessori and our other Montessori tupuna and we wanted to hold on to that essence as our guiding light. May we never lose sight of our why and that we have already been given a roadmap for much of our how. Our proposed three strategic aims for 2025 – 2029 are:

- **Education for the Human Potential**
- **Education and Peace**
- **Education for a New World**

I would like to say a huge thank-you to our MANZ team. I have touched on some of the work that Cathy does but this is just a drop in the bucket of all that she has accomplished. I strive to write my President's Report so that it is not just a rehashing of what Cathy will write in her Chief Executive's Report but I do want to acknowledge the depth of her role and the skill she brings to it. We are so fortunate to have Cathy's passion, dedication, experience and infectious laugh drive our organisation.

Of course, Cathy is supported by both Laurel Kerr, our Administration and Accounts Officer; and Jen Day, our Social Media Officer. I would like to thank them both for the work they do for MANZ and in particular for the work they do to support the smooth running of our conference.

I also want to say a huge thank-you to my fellow MANZ Council members: Mamira Ali, Steven Arnold, Victoria Denyer, Michela Homer, Krista Kerr, and Anne-Marie Love. I feel so privileged to work alongside such an incredible group of people. They inspire me, challenge me (in a good way) and support me in more ways than they will ever know. Thank-you to each of you for your commitment and the gifts of your time, knowledge, expertise and heart.

And at the risk of sounding like an Oscars acceptance speech (I wish!) thank-you to all our members – for the work you do every day serving ngā tamariki and the vision of Maria Montessori for a peaceful world. Sadly, our work is as vital and necessary today as it was 100 years ago. Gladly, it is just as rewarding. Keep the vision at the forefronts of your mind and develop the plan to actualise it.

Tē tōia, tē haumatia

Nothing can be achieved without a plan, workforce and a way of doing things.

*"Here we might observe that the basic mood of the future might well be one of confidence in the continuing revelation that takes place in and through the Earth. If the dynamics of the universe from the beginning shaped the course of the heavens, lighted the sun, and formed the Earth, if this same dynamism brought forth the continents and seas and atmosphere, if it awakened life in the primordial cell and then brought into being the unnumbered variety of living beings, and finally brought us into being and guided us safety through the turbulent centuries, there is reason to believe that this same guiding process is precisely what has awakened us and present understanding of ourselves and our relation to this stupendous process. Sensitised to such guidance from the very structure and functioning of the universe, we can have confidence in the future that awaits the human venture."*

*Thomas Berry, "The New Story," in the Dream of the Earth, p.137.*

Ngā mihi uruhau,

**Gillian Somers**  
**MANZ President**



# Chief Executive's Report

Twenty-twenty-three was another very busy year packed with advocacy, challenges, successes, lots of professional development and learning, international connections and of course our annual conference.

## **STRATEGIC AIM 1: ENABLING TODAY'S LEARNERS FOR TOMORROW'S WORLD**

Advocating for tamariki/rangatahi and supporting members is at the core of our organisation. We have reported on, made submissions, consulted, and advised on an array of issues including radio interviews and a number of media releases. We lobbied and advocated strongly for the education sectors on issues such as funding, education, pay parity, pay equity, fair pay agreements and working conditions to help ensure that the profession is valued and respected.

In 2023 we completed submissions relating to:

- Education and Training Act Amendment 3
- Conduct and Competency Process
- Proposed changes to the Teaching Council rules
- Amendments to ECE Regulations to accommodate Crown acquisition of land and network approval
- Adding conditions to provisional licences, defining 'permanently ceased to operate' and providing for temporary closures
- Pay Parity Funding Review

The Pay Equity Steering Group continued. Hundreds of interviews across the motu were completed with teachers to start assessing the mahi they do to find out if it is the same or substantially similar across the sectors. This is an important part of the pay equity process. There are several further steps to follow in this robust process and the steering group are looking forward to working collaboratively together in the new year to carry on with this important mahi. The overall goal is to demonstrate the true value of educators. Our biggest challenge continues to be to get assurances from the government that there is funding to support any pay equity outcomes post bargaining.

MANZ was approved by the Ministry of Business, Innovation and Employment (MBIE) as a Bargaining Party on behalf of employers relating to the ECE Fair Pay agreement (FPA). However, just before the year end the new government repealed the Fair Pay Act which

immediately cancelled this work.

MANZ did receive a communication from MBIE that they had received an Official Information Act (OIA) request for correspondence between MBIE and the organisations who had applied to be Employer Bargaining Parties for ECE FPA. We provided feedback and redacted information we felt was private to our community before agreeing to the request.

Sector leaders, including myself, lobbied the Labour government addressing concerns relating to the implementation of the 20 hours free for two year-olds. While the announcement was welcome, there were concerns relating to the conditions and implementation thereof. The sector leaders were successful in our lobbying and the government of the day 'walked back' certain criteria.

A great deal of energy and work was undertaken lobbying for Pay Parity funding and for a full funding model review in the ECE sector. Funds were confirmed by the government for Pay Parity which seemed like a huge step forward at the time. However, the uncertainty of whether the new government will continue to fund pay parity in the future is the burning question. In addition to this the full pay parity was really only true full pay parity for one month - which was the first month it was introduced. The following month the KTCA was increased for kindergarten teachers. The government also finally announced that they had agreed to a review of the funding model.

Following the election of a new government, we provided a Briefing for the Incoming Minister (BIM) of Education. The Minister of Education acknowledged the stress the education sectors had been dealing with, as well as the teacher shortages and the ECE unsatisfactory pay parity implementation. Meetings were requested with the Minister to clarify the many questions that inevitably arise as a new Minister takes charge and new policy is embedded.

During 2023 MANZ was part of the Early Childhood Education Collective Agreement negotiations involved in the requirements and bargaining on behalf of ECE employers. The negotiations will continue through 2024.

To ensure members were informed of what I was working on regarding government agency work, a 4-6 weekly InTouch centre/school newsletter to leaders was emailed. Quarterly Montessori Voices and e-zine Informed magazines have continued to be published.

MANZ is seen as a trusted strategic advocate and leading partner in the education sectors as evidenced through representation and participation on a number of advisory groups across government agencies and networks.

### THE GROUPS CURRENTLY INCLUDE:

#### ECE, Primary and High Schools Teaching Council

#### External Stakeholders Group

This group provides the Teaching Council with advice in respect to any of the Council's role or responsibilities relating to kaiako, students, and others in the field.

#### Education Review Office

#### External Stakeholder Group

This group allows ERO to share information and engage with key stakeholders about ERO's methodology developments and changes.

#### NZ Police

#### Police and Education Partnership

This group comprises representatives from the Ministry of Education, NZ School Trustees Association, the PPTA as well as the schooling and early childhood sectors. The group meets in person or online 4 times a year to share information.

#### Steering Group for Pay Equity Claim

This group is managing the Pay Equity education claim.

#### Te Rito Maioha

#### External Stakeholders Groups for both ECE and Primary

The representation on these two groups is to be involved in programmes which affect our community and to be able to give feedback.

#### TEA: Transforming Education Australasia

This group involves different education groups across Australia and MANZ in NZ.

#### ECE Only: Ministry of Education

#### ECAC – Early Childhood Advisory Committee

We meet to identify and discuss strategic and operational issues and to share information that allows sector representatives to give feedback on proposals by the Government, the Ministry and other government agencies.

#### Early Learning Regulatory Advisory Group

This group meets 6 times a year to consider regulation changes arising from the Early Learning Action Plan.

#### Kowhiti Whakapae Advisory Group

This group has been developing the tools and associated resources to strengthen formative assessment and teaching practice within the framework of Te Whāriki He whāriki mātauranga mō ngā mokopuna o Aotearoa (Te Whāriki). It is part of the common practice model for the Literacy & Communications and Maths Strategy. Tools and associated resources are now being developed for social-emotional learning, oral language and literacy, and maths. *Please note: Gillian Somers has taken the lead in this group.*

MANZ will continue advocacy in 2024 ensuring issues which affect our community are front and centre to effect real change.

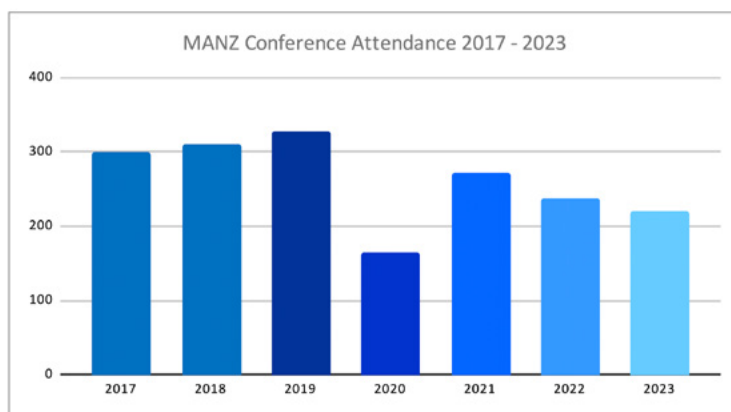
This year I presented at three international conferences, two in Australia and one at the Congress in Thailand. Along with myself at Congress we had three other NZ Montessorians presenting which was fantastic. In total we had 13 NZ attendees at Congress from across the motu.

The benefit of attending international conferences is the networking which happens, meeting people from other countries and making connections for speakers and workshops which will be suitable for our community. One of the workshops which is available during 2024 is the *AI (Artificial Intelligence): Friend or Foe?* This came from hearing Tim Moore speak at one of the Australian conferences.

### STRATEGIC AIM 2: EMPOWERING THOSE WHO SERVE ĀKONGA

An important part of my mahi is to provide strong leadership in the education sectors, supporting members through the provision of professional development workshops and providing an annual conference, holding an annual general meeting. Members are also able to access human resources and other centre/school and teacher-based advice.

MANZ held our annual conference which was entitled *Be Inspired and Inspire; Whakamanawahia te manawa* in July. Over two days we had a wonderful experience, where everyone's kete was filled with new ideas and concepts focusing on how kaiako can make their environments best by not just international speakers but also many NZ speakers presenting.



MANZ offered a number of [Professional Development and Learning \(PLD\)](#) opportunities during 2023. One workshop in particular was on the Professional Growth Cycle (PGC) for Leaders. From this we now have 8 PGC for Leaders groups which is awesome. Attendance was lower for both conference and PLD workshops from previous years. We suspect the lower uptake is most likely to reduce budgets for PLD but also there are a lot of online courses available for kaiako to choose from.

	Facilitator	Number of attendees
<b>PLD 0-3 Years: In partnership with MMEF:</b> Marvellous Movement	Sara Brady	28
<b>PLD 0-6 Years:</b> ERO's Focus on the National Education and Learning Priorities (NELP)	Sandra Collins	31
<b>PLD 0-6 Years:</b> Teaching Civility and Social Justice in a Montessori Environment	Nikole Campbell	10
<b>PLD For all:</b> Cyber Security – A misguided perception	Christopher Ward	6
<b>PLD for all:</b> Professional Growth Cycle for Leaders	Michela Homer, Gillian Somers, Cathy Wilson	39

### STRATEGIC AIM 3: EMBEDDING BICULTURALISM, INCREASING EQUITY

Our kaupapa and commitment to Māori and tikanga Māori has grown in strength this year. We have continued to work with Arapera Herewini-Card, our bicultural keynote speaker at conference, and surveyed yourselves leading towards rebranding of MANZ - which had not been done since 2008. The re-brand and new look of MANZ will be presented at conference 2024. We have also had quarterly bicultural lessons published in Montessori Voices to help us all build up our knowledge and understanding. Thank-you very much to Dannielle King for these lessons.

#### Thank-you

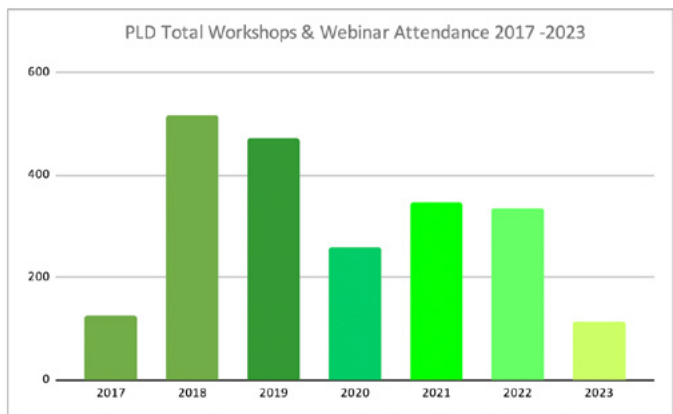
I would like to acknowledge the staff here at MANZ who provide amazing support for me in my role, Laurel Kerr and Jen Day. Without them MANZ would not run as well as it does.

To the amazing writers of Montessori Voices who give up their time and expertise writing articles. To Gillian and Council members, who are all volunteers, who respond to my requests, providing feedback and support regardless of the work I send their way.

Finally I would like to say a very big thank you, to you, our members for all your support in 2023. It means a lot to us that you are a part of our whānau. It's been a hectic political year and we need to celebrate the wins we did achieve. It is going to be an interesting 2024 as we manoeuvre our way through policy changes by the new government - and as the new Government's work plan rolls out we will continue to advocate on your behalf.

*Ki te kapuia e kore e whati (we succeed together).*

**Cathy Wilson**  
**Chief Executive / Kaiwhakahaere Matua**



[Social Media](#) platforms have continued to grow during the year. Followers on our pages are:

#### Facebook

General from 2392 to 2630  
 0-3 Years from 215 to 230  
 3-6 Years (new page) 26  
 6+ Years 30

#### Instagram

96 to 257

#### LinkedIn

152 to 174

Following survey interest from our community Te Rito Maioha agreed to the development of two [Montessori Masters](#) papers. Jan Gaffney was employed to write the two papers. These will commence in 2024

# Membership

## 2023 MEMBERSHIP

119

Schools

2

Organisations

8

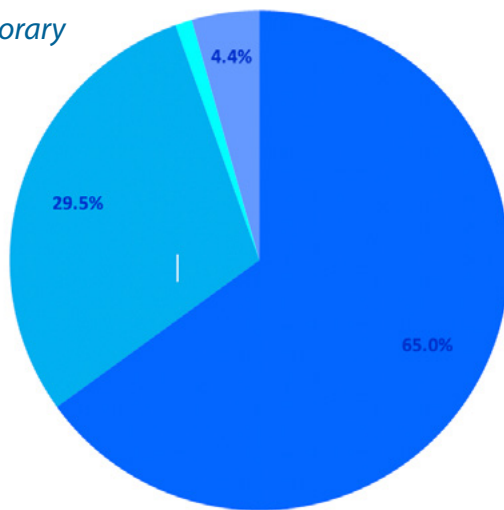
Honorary

4,328

families / Whānau

54

Individuals



We have welcomed six MANZ member schools during 2023.

### Auckland

Gulf Harbour Montessori  
Little Royals Montessori  
Nikau School

### Wellington

Khandallah Little School

### Canterbury

Little House Montessori Zinnia Way  
Little Tamariki Montessori Preschool

Schools that were Closed (C), Sold (S), Withdrawn (W), or Converted to mainstream (M) during 2023.

### Auckland

Waiuku Montessori Preschool (M)  
Puawai Montessori School (C)

### Hawkes Bay

Bay Buddies Montessori Preschool (C)

### Manawatu

Rainbow Corner Montessori (C)

### Wairarapa

Scuola Montessori Masterton (C)

### Kapiti

Kapiti Primary school (C)

### Wellington

Aroha Montessori (C)

### Otago

City Heights Childcare and Montessori Ltd (C)

# Financial Performance Report

## FINANCIAL PERFORMANCE REPORT

[CLICK HERE](#) for the detailed 2023 Audited Performance Report which is available to download and print off the MANS website

### ACTUAL vs BUDGET

The 2023 budget predicted a deficit of \$498. The actual deficit for 2023 was \$15,242.

	Facilitator	Number of attendees
<b>Income</b>		
Membership	\$177,422	\$175,250
Professional Development	\$88,668	\$138,470
Advertising	\$9,509	\$11,400
Commission (Helvativa)	\$2,794	\$5,000
Interest Received	\$15,786	\$9,652
<b>Total Income</b>	<b>\$294,179</b>	<b>\$339,772</b>

Total Income was under budget by \$45,593.

Professional Development was under budget by \$49,802 the main contributors to this were less registrations for conference than expected and a decrease in the number of registrations for PLD.

Advertising income was under budget by \$1,891 due to less jobs being advertised on our website.

The commission agreement with Helvativa came to an end part way through the year.

	Actual 2023	Budget 2023
<b>Expenditure</b>		
Volunteer & Employee Related	\$177,422	\$175,250
Costs related to providing goods & services	\$88,668	\$138,470
Grants & Donations	\$9,509	\$11,400
Other Expenses	\$2,794	\$5,000
<b>Total Expenditure</b>	<b>\$309,421</b>	<b>\$339,275</b>

Total Expenditure was under budget by \$29,854.

Total Costs related to providing goods & services was under by \$28,519. The major contributor to this was Professional Development costs being less than budget by \$28,762. This was due to conference expenses being less than budgeted as there were lower than expected attendees.

### BUDGET 2024

Budget 2024	
<b>Revenue</b>	
Fees, subscriptions, and other revenue from members	\$188,768
Conference	\$102,040
Professional Development	\$12,200
<b>Total Revenue</b>	<b>\$332,927</b>
<b>Expenditure</b>	
Volunteer & Employee related costs	\$178,350
Costs related to providing goods or services	\$156,667
Grants & Donations	\$1,500
Other Expenses	\$5,445
<b>Total Expenditure</b>	<b>\$341,962</b>
Net Surplus / Deficit	<b>(9,035)</b>

The 2024 budget prepared by Council predicts a deficit of \$9,035.

**Anne-Marie Love**  
Treasurer



# MANZ Council 2022



**GILLIAN SOMERS**  
*(President)*

Re-elected **2022**  
Rotation due **2025**



**ANNE-MARIE LOVE**  
*(Treasurer)*

Re-elected **2022**  
Rotation due **2025**



**MICHELA HOMER**

Re-elected **2021**  
Rotation due **2024**



**MAMIRA ALI**

Re-elected **2021**  
Rotation due **2024**



**VICTORIA DENYER**

Elected **2021**  
Rotation due **2024**



**KRISTA KERR**

Elected **2022**  
Rotation due **2025**



**STEVEN ARNOLD**

Elected **2022**  
Rotation due **2025**

