

# Request for Application to operate a Partnership School | Kura Hourua opening in 2019 (Round 5)

Stage Two – Response Form (Priority Learner)

Close Date - Tuesday 9 May 2017 at 5pm

Applicant  
School Name:

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### Requirements for Response document

Please write clearly and succinctly.

We are looking for facts and evidence within your response.

Your response should be no more than 100 A4 single sided pages with text no smaller than arial font 10. This includes all sections of the document including the front cover and declaration sections (but not the suggested appendices list or the financial submission)

You should not make changes to the template.

# 1. Contact Details

Contact person:				
Position:				
Phone number:				
Mobile number:				
Email address:				
Is the contact person authorised to negotiate?	Yes		No	

## 2. Sponsor organisation

Complete the following table detailing the organisation that will, if successful, be named as the sponsor of, and will operate, the school (“**Sponsor**”).

You must complete this section to the extent possible, even if the Sponsor is yet to be established. If the information about the Sponsor is not yet known or decided it will need to be provided as early as possible in the application process in order for it to be approved as a Sponsor. If the Sponsor will rely on experience or attributes of the Applicant it will need to be made clear how they will be shared or made available to the Sponsor.

### 2.1 Summary of Key Information

	Area	Response
a	Status of Sponsor	<i>Already established / yet to be established (delete as applicable)</i>
b	Full legal name of Sponsor or proposed name, if yet to be established (if known)	
c	Trading name (if different to the above)	
d	Year established (if applicable)	
e	Name of parent organisation	if applicable
f	Physical address	<i>If the Sponsor is registered, insert registered office address</i>
g	Postal address	
h	Website (if applicable)	
i	Location of head office	<i>City in New Zealand</i>
j	Country of residence	
k	Type of entity (legal status)	<i>e.g. body corporate (i.e limited liability company, incorporated charitable trust or incorporated society), limited partnership, corporation sole or other (please select one or specify ‘other’ entity type)</i>
l	Registration Type(s)	<i>Describe registration type(s) (e.g. registered charitable entity) If not registered or yet to be registered, enter “Not Registered” and explain why registration is not necessary or has not occurred</i>
m	Registration number	<i>Provide the registration number(s) for the Sponsor as appropriate</i>

	<b>Area</b>	<b>Response</b>
n	Current directors, officers, trustees etc	<i>List all current directors, officers, trustees (as applicable)</i>
o	Other key relevant personnel or proposed personnel (eg directors, officers, trustees etc) if the Sponsor entity is yet to be established	<i>List any other key personnel who will be involved in the establishment and/or ongoing operation of the school</i>
p	Sponsor's significant experience	List the Sponsor's significant experience relevant to this application to operate a partnership school
q	List the other key current activities (including business activities) of the Sponsor	1. 2. 3. 4. 5.
r	Shareholders, members or Beneficiaries of the Sponsor	<i>List or describe the shareholders, members or beneficiaries (as applicable) of the Sponsor</i>
s	Confirmation of support	<i>Confirm whether any support (e.g. written assurance) has been obtained from the shareholders, members or beneficiaries (as applicable) to show that they support this Application</i> <i>[Note: include any evidence as an attachment to this Application]</i>
t	Is the Sponsor a TEI?	Yes/No
u	Does the Sponsor also operate an ECE?	Yes/No

## **2.2 Outline the track record of the Sponsor organisation that demonstrates it can operate a partnership school**

**Response**

**2.3 Outline the capacity of the Sponsor to run the partnership school alongside any other business operations it may have**

*We are aware from experience that a partnership school can be complex and resource intensive to establish and to operate. Demonstrate that you have the capacity to undertake the activity of establishing and running a school, and meeting contractual obligations, alongside any other business activities you may operate.*

**Response**

**2.4 If the Sponsor is yet to be established, provide a detailed Sponsor establishment implementation plan, which references all steps and actions necessary and timeframes for establishing the Sponsor in advance of the contract being signed (expected to be in August 2017)**

**Response**

### 3. Applicant organisation

- If this application has been submitted by the proposed Sponsor detailed in section 2 above, you do not need to populate the tables in sections 3.1 to 3.4 below, but you must complete the tables in sections 3.5 to 3.9.
- If this application is being submitted by an applicant who is yet to establish the Sponsor (i.e. because the legal entity is yet to be established), you must complete this section 3 in its entirety.

#### 3.1 Profile of applicant organisation

As we are looking for this application to be self-contained, please include the following information.

If the application has been submitted by a joint venture or a consortium, please copy and paste the table below and populate it for each joint venture or consortium member.

	Area	Response
a	Name of organisation	
b	Type of organisation	<i>Limited liability company / trust / consortium / other</i>
c	Relationship to the Sponsor	<i>Describe the Applicant's relationship to the proposed Sponsor</i>
d	Registration type(s) and Registration number (s) (if applicable)	<i>Describe registration type(s) (e.g. registered charitable entity)</i>
e	Name of parent organisation (if applicable)	
f	Current directors, officers, trustees etc	<i>List all current directors, officers, trustees (as applicable)</i>
g	Year established	
h	List your key current activities	1. 2. 3. 4. 5.
i	List key personnel relevant to this application who will be involved in the establishment and/or ongoing operation of the school, including your proposed school leader, if known	

j	List your significant experience relevant to this application to operate a partnership school	
k	Total no. of staff in NZ	
l	Shareholders, members or beneficiaries	<i>List or describe the shareholders, members or beneficiaries (as applicable) of the Applicant</i>
m	Confirmation of support	<i>Confirm whether any support (e.g. written assurance) has been obtained from the shareholders, members or beneficiaries (as applicable) to show that they support this Application [Note: include any evidence as an attachment to this Application]</i>
n	Legal advice	<i>Confirm whether any legal advice has been obtained which supports that this Application (and, if successful, the Sponsor's entry into contract with the Minister to operate a Partnership School) is a proper exercise of the Applicant's powers, objectives or purposes with reference to the Applicant's constitution, constituting deed or rules</i>
t	Is the Applicant an TEI?	Yes/No
u	Does the Applicant also operate an ECE?	Yes/No

**3.2 Outline the role the Applicant organisation will play in relation to this application, the establishment of the Sponsor, or the establishment and/or operation of the partnership school.**

**Response:**

**3.3 Outline the track record of the Applicant organisation that will enable it to assist and/or achieve the role described in section 3.2 above.**

**Response:**



**3.4 Outline the capacity of the Applicant organisation to assist the Sponsor to run the partnership school alongside any other business operations it may have**

*We are aware from experience that a partnership school can be complex and resource intensive to establish and to operate. Demonstrate that you have the capacity to undertake the activities required to establish and run a school, and to meet contractual obligations, alongside any other existing or anticipated business activities. .*

**Response:**

**3.5 Proposed subcontractors**

**Disclosure:** Applicants must indicate and provide details below if they intend to sub-contract any part of the application requirements to any person or organisation, who is not an employee.

*Copy and add more tables as required*

**Will the Sponsor sub-contract any part of the operation of the proposed partnership school to other parties?**

**Response:**

Yes / No (delete as applicable) (If yes, please provide details below)

**Sub-contractor #1**

Sub-contractor name:	
Address:	
Specialisation:	
Describe the deliverables the sub-contractor will be responsible for:	
Provide evidence that the proposed subcontractor is willing to provide these services (eg a Memorandum	<i>(Evidence to be attached)</i>

of understanding).	
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<b>Sub-contractor #2</b>	
Sub-contractor name:	
Address:	
Specialisation:	
Describe the deliverables the sub-contractor will be responsible for:	
Provide evidence that the proposed subcontractor is willing to provide these survives (eg a Memorandum of understanding).	<i>(Evidence to be attached)</i>

### 3.6 Financial information

If the application has been submitted by a joint venture or a consortium, please copy and paste and complete the following table for each joint venture or consortium member.

Current financial status:	Provide a brief description of the organisation's current financial status and level of stability
Gross revenue:	<i>State the gross revenue for the last two financial years</i>
Net profit (surplus) and Net Assets:	<i>State the net profit (or surplus) for the last two financial years and the total value of net assets as at the closing date of the last financial period.</i>
Last audited financial accounts:	<i>Insert date of last audited financial accounts</i>
Copy of latest audited accounts attached?	Yes/ No

Copy of latest annual report attached?	Yes/ No
Is the organisation in dispute with any trade union?	Yes/No

### 3.7 Referees

Please supply the details of three referees. Referees provided should be able to attest to your organisation's capability in the areas of education, business and community engagement.

Please do not provide employees of the Ministry of Education, Education Review Offices, or E Tipu e Rea as referees.

Referee #1	
Name of organisation:	
Name of referee:	
Telephone:	
Email:	
Relationship:	<i>Summarise the nature of the relationship with this referee</i>
When:	<i>State the dates that this relationship covers</i>

Referee #2	
Name of organisation:	
Name of referee:	
Telephone:	
Email:	
Relationship:	<i>Summarise the nature of the relationship with this referee</i>
When:	<i>State the dates that this relationship covers</i>

Referee #3	
Name of organisation:	
Name of referee:	
Telephone:	
Email:	
Relationship:	<i>Summarise the nature of the relationship with this referee</i>
When:	<i>State the dates that this relationship covers</i>

### 3.8 Current and recent government contracts

Please provide a list of all (including current) government contracts the Applicant holds or has held within the last 12 months. If the application has been submitted by a joint venture or a consortium, please copy and paste the table for each member of the joint venture or consortium. Add more rows onto the bottom of table if needed.

Note: we may contact the contract manager(s) at the relevant Government Agency during the due diligence process in relation to your organisations performance under the contract.

<b>Government Agency Name</b>	<b>Contract Title</b>	<b>Contract Manager Name address and phone number</b>	<b>Total value of Contract (\$)</b>	<b>Contract Term (ie start and end date)</b>

### 3.9 Probity Requirements

We are seeking full disclosure in relation to any person or organisation that will have an ownership, management or operational function within in the proposed Partnership School. This includes the Sponsor and/or Applicant (if they are different entities) and their shareholders or trustees, key staff, and subcontractors. In relation to the above entities or persons, you must declare any pending claims or cases, or court judgments or decisions within the last 6 years. Add more rows onto the bottom of table if needed.

a	List any pending claims or cases	
b	List any court judgments or other decisions made in the last 6 years	

## 4. The Proposed School

### 4.1 Key information

a	Proposed name of the school			
b	Will the school be a primary, secondary, or composite			
c	Class/year levels for which education may be provided at the school			
d	Proposed Opening Roll		Proposed Maximum Roll	
e	Will all or any of the class levels of the school be single-sex			
f	Proposed location	<i>Address</i> <i>Suburb</i> <i>City</i>		
g	Summarise any religious, philosophical, or other distinguishing characteristics of the school			

### 4.2 Distinctive mission, vision and special character

#### 4.2.1 Expand on the school's special character and distinctive concept.

**Response:**

**4.2.2 Provide a clear description of what sets your school apart from existing education provision. Include specific information on how you will use the flexibilities of the model**

**Response:**

**4.2.3 What is the vision and mission statement of the school?**

**Response:**

**Vision:**

**Mission:**

## 5. Achievement of Contracted Outcomes

### Accelerating the achievement of priority learners

In the following questions we are seeking specific information on the difference that your school is expected to make to your targeted cohort of students.

It is important that information is both statistical and evidence based. Provide evidence, research and data analysis to support your response and include links to and/or electronic copies of evidence, research, data and analysis that supports your response.

You may consider using the following types of data in your response:

- NCEA achievement results and national standards achievement information
- Attendance data
- School retention rates/school leaver data
- Rates of stand downs and exclusions
- Tertiary pathway information (eg % of cohort proceeding to tertiary education )
- Vocation and career pathway data (eg % of cohort to enter employment post schooling, or NEET data)
- Other Workforce participation data

#### 5.1. Priority Learner Requirement: Identify the priority student groups that will be targeted by your school. Enter percentage(s) in the table.

**Note:**

- **having 75% of your school's students from priority learner groups is a requirement of this process (and the contract)**

Māori	
Pasifika	
Low socio economic	
Students with special educational needs	

#### 5.2 Describe the cohort of students that your school will target (be as specific as possible in your response)

**Response:**

**5.3 Describe the current educational outcomes and attainment levels (eg achievements) of your proposed cohort of students**

**Response:**

**5.4 Describe the improved educational outcomes/and attainment levels (eg achievements) that your proposed cohort of students will achieve as a result of having attended your school**

**Response:**

**5.5 Provide a detailed description of the well-grounded programmes, strategies and instructional practices your partnership school will use to bridge the gap between current attainment levels and the improved attainment you describe in 5.4 above.**

**Response:**

**5.6 Provide supporting evidence for why you believe your response to 5.5 above will result in an enhanced level of educational attainment.**

**Response:**



**5.7 To summarise this section, what are the proposed objectives for the School?**

**This can include empirically-based student achievement, as well as values based or qualitative objectives.**

**These objectives may be included in the contract with the Minister if you are successful in this process.**

**Response:**

## 6. Governance

**6.1 Provide an overview of the governance arrangements for the Sponsor organisation and the proposed School (if different).**

Response:

**6.2 Provide the names and qualifications of each person who will be on the Sponsor's governance body (ie the names and qualifications of each Trustee or Director)**

Name	Role on Governance Body	Brief summary of credentials (ie why are they qualified for this role)

**6.3 What role will the governance model play in ensuring the Sponsor meets its contracted obligations to the Ministry (including reporting, performance standards, etc.)? Include details of any systems that will be put in place to ensure the contracted outcomes are monitored and achieved.**

Response:

**6.4 What is the proposed relationship between the governance of the school and the school's leadership?**

Response:

## 7. Student Pathways (enrolments and transitions)

### 7.1 School roll

Provide your projected school roll for each of the next 6 years by year level.

Year Level	2019	2020	2021	2022	2023	2024
1						
2						
3						
4						
5						
6						
7						
8						
9						
10						
11						
12						
13						
Other						
Total						

(note: it is these roll numbers that must be used to calculate Ministry Funding in your financial forecasts)

**7.2 If successful, we will need to agree a minimum and maximum roll number for your schools. Provide your proposed roll numbers below, including evidence for why you consider them reasonable.**

	Proposed Roll Number	Rationale
Proposed Minimum Roll		
Proposed Maximum Roll		

**7.3 Provide evidence that your cohort of students will choose to enrol in your proposed school**

**Attach evidence to support this. eg independent surveys you have commissioned, letter(s) of support from local parent groups iwi or others**

**Response:**

**7.4 Outline your proposed plan and timeline for enrolling students for the 2019 school year**

**Response:**

**7.5 If you are proposing to start your school at a non-traditional year of transition between schools (e.g. other than at the start of primary, intermediate or secondary school), how can you be confident that the number of students and their families/whanau (indicated in the table at 7.1), will opt to leave their existing school to transition to your school at that year level?**

**Response:**

**7.6 After the establishment year, how would achieve and sustain the level of enrolments anticipated in the roll table at 7.1?**

**Response:**

## Transition of students into the school/ or when leaving the school

**7.7 How will you ensure students are appropriately transitioned into your school?**

**What links and relationships will you establish to contributing ECE and schools, and to other organisations that may refer or be a feeder for students to your school?**

**Response:**

**7.8 How will you ensure students are transitioned out of your school and into further education (eg secondary or tertiary) or into the workforce?**

**Response:**

## 8. Educational Plan

### 8.1 Curriculum

<b>Do you plan to use the New Zealand Curriculum or Te Marautanga o Aotearoa?</b>	<b>Yes/No</b>	<b>If Yes – Complete Q.8.1.1 then go to 8.2</b> <b>If No – Complete Q.8.1.2 and 8.1.3 and 8.1.4, then go to 8.2</b>
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**8.1.1 If you are using the New Zealand Curriculum or Te Marautanga o Aotearoa, please explain why this is the best choice for your students**

**Response:**

**8.1.2 If you plan to develop your own curriculum, provide your curriculum framework here, and attach your curriculum handbook (if you have one)**

**Response:**

**8.1.3 Explain and provide evidence to support why you have chosen your alternative curriculum**

**Response:**

**8.1.4 If your curriculum documents are subject to further development, include details of the timeline to complete them, and information about the person or organisation who will be developing the curriculum and their skills and qualifications to do so**

**Response:**

## **8.2 Special Character**

**8.2 How does the curriculum you propose support the delivery of the special /distinct concept of your school**

**Response:**

## **8.3 Pedagogy**

**8.3 Please explain your approach to delivering your proposed curriculum (e.g. approaches to teaching and learning)?**

**Response:**

#### 8.4 Teaching quality and capability

**8.4 How will you ensure that the quality and capability of your teaching staff will be sufficient to enable your school to achieve the outcomes you are proposing for your students, and how will they support the special character of your school?**

**Response:**

#### 8.5 Breadth of curriculum

**8.5 Indicate the subject range/learning areas at each year level that your school will offer**

**Response:**

#### 8.6 Qualifications or achievement standards offered

**8.6 Provide a full list of the qualifications and/or achievement standards that your school will offer**

**Response:**

#### 8.7 Delivery of education by other organisations (not the Sponsor)

**8.7 If not offering all subjects as face to face delivery by the Sponsor, which ones will be delivered on-line or via partnerships with other schools or tertiary institutions?**

**Clearly outline any contracted services that will be involved in the delivery of education (including Te Aho o Te Kura Pounamu Correspondence school and online education providers and tools, etc)**

**Response:**



## 8.8 Assessment and achievement

**8.8.1 What is your overall approach to assessing students' progress in relation to your student achievement goals?**

Note that where appropriate, sponsors will be required to use PAT and/or e-asTTle, together with the Te Waharoa Ararau and/or PaCT assessment instruments. Please specify any other tools that you plan to use.

Response:

**8.8.2 Outline how you will accelerate the learning of individual students if they are well behind academically for their age group**

Response:

## 8.9 Student behaviour management and safety

**8.9.1 Outline the school's philosophy and methodology regarding student behaviour management; including a description of your proposed pastoral care process**

Response:

**8.9.2 Set out your strategy and approach to suspension, expulsion and other disciplinary matters**

Response:

**8.9.3 What policies and procedures will you put in place to ensure your school meets its obligations for child protection under the Vulnerable Children's Act?**

Further information can be found at:

<http://www.education.govt.nz/school/running-a-school/vulnerable-children-act-2014-requirements-for-schools-and-kura/>

**Response:**

## **8.10 School Schedule**

**8.10 Outline your proposed school calendar setting out:**

- the daily hours of operation;
- indicative student timetables; and
- how the school day and year will be organised to include instruction and assessment, sufficient time for students who need additional instruction, including one-on-one support, to 'catch up' to the standards required, independent study, professional development, parent-teacher conferences, and extra or co-curricular activities

**Response:**

# 9. Leadership and Teacher Quality and Resources

## 9.1 Organisational structure

**9.1.1 Provide the organisational chart of the proposed school.**

**Response:**

**9.1.2 Identify the number and type of staff that will be engaged to operate your school**

You should adjust the table (add/delete rows) to reflect your proposed school structure.

Note: the content of this table should be the same as the 'I-staff' tab in the financial submission.

Position	Number of FTEs by position					
	2019	2020	2021	2022	2023	2024
<b>Management</b>						
Principal / Academic Lead						
Business Manager						
Other [list]						
Other [list]						
<b>Administration</b>						
Administration/Business Manager						
Administration Officer						
Admin Support						
Other [list]						
<b>Property</b>						
Caretaker						
Ground-keeper						
Cleaning Staff						
Other [list]						
<b>Teaching Staff</b>						
Principal / Academic Leader (if shared with						

management role)

Registered with a current practising certificate or with a Limited Authority to Teach

Registered Teacher Aides

Other [list]

**Non Registered (or Registered but without a current practising certificate), staff**

Teachers not holding current teaching practice certificate

Teacher Aides

Other [list]

**TOTAL (FTEs)**

## 9.2 Capabilities of school leader and teaching staff

**9.2.1 Detail the professional backgrounds, depth of experience, relevant skills and qualifications, and personal qualities that you will seek in a school leader**

**Response:**

**9.2.2 Detail the professional backgrounds, depth of experience, relevant skills and qualifications, and personal qualities that you will seek in the members of the school's senior management team**

**Response:**

**9.2.3 Detail the professional backgrounds, depth of experience and personal qualities that you will seek in teachers and other school staff**

**Response:**

### **9.3 Recruitment and Retention**

**9.3.1 Describe your approach to attracting and retaining high quality staff.**

If the school you are proposing will be located in a remote area, explain how you will address the particular challenge this presents in terms of attracting high quality teachers including how you might use the flexibilities of the model to assist with this.

*Note: a recruitment strategy based solely around the attractiveness of your geographic location or the attractiveness of your unique concept as the strategy for staff attraction and retention is unlikely to meet our requirement. We are looking for a strong plan on how your school will attract and sustain teachers especially in a competitive market.*

**Response:**

**9.3.2 If you are proposing to use teachers who do not hold a Practising Certificate, explain your rationale for this, what subjects they will teach, what experience or skills you will require them to have, and the role they will play in the day-to-day operation of the school**

**Response:**

### **9.4 Professional Learning and Support**

**9.4.1 Outline your approach to teacher appraisal, performance management and professional development and how it will contribute to a culture of continuous development within the school**

**Response:**

## 9.5 Other Resources

Please provide a high-level list of the resources and specialist equipment you will require to run your school.

Resource/Equipment	How you will source this resource (including if funded or donated) If donated, please provide evidence to support this occurring

## 10. Community Outreach and Engagement

**10.1 How will you develop community support for and engagement with your proposed school?**

**Response:**

**10.2 What community partnerships have you established or do you intend to establish to support the school? How do these community partnerships link to your curriculum and outcomes?**

**If you have already developed community partnerships, please attach evidence of this (eg letters of support from parent groups, community groups, iwi, etc supporting the establishment and running operation of your proposed school in the area).**

**Response:**

**10.3 How will you engage with parents/family/whānau in their child's learning?**

**Response:**

# 11. Premises

## 11.1 Premises

**11.1.1 If known, provide the address of the proposed school premises (if more than one option, provide details of each) and the certificate of title number/identifier (if known)**

Response:

**11.1.2 If not known, when and how will the school site be identified and are there any preferred sites? Please provide details of any preferred sites and a detailed plan (including all steps and actions likely to be required and a timetable) for how such preferred sites will be acquired/secured.**

Response:

## 11.2 Current Property

**11.2.1 Are the proposed premises currently owned or leased by the Applicant?**

Owned - Yes / No (delete as applicable)

Leased - Yes / No (delete as applicable)

Not currently owned or leased - Yes / No (delete as applicable)

**If not currently owned or leased by the Applicant, what steps are required to be taken to acquire / secure a lease of those premises?**

Response:



**11.2.2 If the answer to section 11.2.1 is that the property will be leased, describe the type of property arrangement, including the terms of any tenancy (if applicable) and provide written evidence of that property arrangement (e.g. a copy of the certificate of title or written agreement from the owner of any leasehold agreement)**

**Will the property be leased? Yes / No (delete as applicable)**

**Response:**

### **11.3 Building Alterations**

**11.3.1 Are the existing facilities on the proposed site that you intend to utilise for the partnership school adequate for school use in their current state?**

**Yes / No (delete as applicable)**

**Response:**

**11.3.2 Do you envisage that these premises you propose for the school will be the permanent site for the school?**

**Yes / No (delete as applicable)**

**Response:**

**11.3.3 If the answer to 11.3.1 is No (not adequate), (ie the proposed site is not currently adequate) describe how the premises or facilities would need to be altered to make them suitable for the proposed school, including reference to any plans to renovate or extend the existing facilities and how that will be funded and timing for such renovations or extensions. If the premises will not be the permanent site, outline what your longer term property plans are.**

Response:

#### **11.4 Sharing with another school**

**11.4.1 Will the partnership school share any facilities or other resources with another state school? If Yes, which state school and what premises / resources?**

Yes / No (delete as applicable)

Response:

#### **11.5 Consents**

**11.5.1 Describe if there are any known consent issues that may impact the ability to use the proposed premises or facilities to operate a partnership school (or the date by which they can be used)**

Response:

#### **11.6 Expansion as roll grows**

**11.6.1 Describe plans for expanding school facilities to match your projected roll numbers, including how you will attract additional staff and acquire other resources needed to serve a larger student body**

Response:

## 11.7 Asset Management

**11.7.1 Explain your proposed strategies for asset management and maintenance of your proposed premises and facility, including assurance processes that ensure applicable codes and standards are maintained for the term of the Agreement.**

**Response:**

# 12. Non-Government investment/Funding and Financial viability

## 12.1 Non Government Funding/Investment

**12.1.1 To successfully deliver the school vision and mission and the desired level of educational achievement, it is likely you will need to source funding and resources from outside of the public sector. Outline your approach to attracting either private sector investment or resources and/or philanthropic or community-based funding.**

**Response:**

## 12.2 Non Government /Resourcing Funding Secured

Outline the financial or in-kind support you have in place for your proposed school. As per 2.8.3 of your EOI response, we request that you now provide evidence of the support you indicated in your EOI (eg letters from non-government funders/supporters detailing the level of support they will provide to the proposed school and when it would be provided).

If you wish to list any support you are yet to secure, you will need to include a plan securing this support.

If you have included any not-yet- secured funding in your financial forecast, please make this clear in the financial submission.

Name of Organisation	Support they will provide	Is a letter or other evidence attached?

## 12.3 Financial Submissions

You are required to complete two financial submissions:

- A. Financial Forecast - this is your school's budget and financial forecast. It should be based on your organisation achieving its projected roll numbers. This forecast must include the establishment period and the first six years of operations.
- B. Sensitivity test - we are looking to understand the impact of roll variability on the financial viability of your school. To assist in our understanding, a second version on your above budget, needs to be submitted, but in this forecast you must demonstrate the impact not achieving the projected roll by would have on your operations. This forecast should be based on achieving 80% of your projected roll

numbers for 2020 to 2025 (after the guaranteed funding period). Make clear what expenses will be adjusted and/or additional non-government revenues sought to sustain the viability of your school if this scenario actually arises.

The Financial Forecast and the Sensitivity Test must be completed on the template provided.

In this process you can request that the Ministry calculate the indicative level of Crown funding you would receive for you to input into the spreadsheet. If you would like us to do this, you will need to email your projected roll table (from section 7.1 of application form) to PartnershipSchoolsApps@education.govt.nz by 21 April 2017. We strongly recommend that you do this.

Additionally, we strongly recommend that you ask an Accountant to check your spreadsheets before they are submitted. Note: We are unable to accommodate significant rework due to errors in financial submissions in our timeline.

If your financial forecast includes revenues (other than those provided for under the Partnership School Contract) we will require specific evidence to support this (eg letters of commitment).

**12.3.1 Clearly outline all assumptions you have made in your financial submission.**

**Response:**

**12.3.2 Clearly articulate how you would manage your budget if you achieved lower than anticipated numbers and therefore Ministry funding (e.g. 80% of anticipated roll numbers). Outline what cuts you would make to costs and/or where you would source additional revenues to make up any potential shortfall.**

**Response:**

### 13. Acceptance of Draft Agreement

The Ministry’s commercial position is reflected in the draft Contract attached as Schedule 1 to this RFP.

If you would not be prepared to enter into the draft Contract in the form attached, you will need to specify the amendments you consider are required to the form of contract and the reasons you are requesting them, proposing an alternative position that would protect the interests of both parties and confirming that all the other clauses in the contract are acceptable.

Applicants should note that the Ministry is currently reviewing the draft Contract, and we expect to release a revised form of draft Contract to each Applicant (or, if shortlisting has already occurred, a clear outline of the proposed changes will be provided to shortlisted Applicants. If this occurs, Applicants or shortlisted Applicants (as applicable) may be asked to update their response to confirm their acceptance of the revised draft Contract or provide their requested amendments in accordance with the paragraph immediately above, and any further instructions given by the Ministry.

The Ministry will, in its absolute discretion, take any amendments proposed by the Respondent into account during the evaluation process, but the Minister is under no obligation to accept any such proposed amendments.

Should an Applicant be selected to proceed to contract negotiations, only those provisions identified as requiring amendment in the Proposal (including as updated after the release of the revised draft Contract) and any entirely new provisions that the Minister may introduce after that as forming part of the final Contract can be the subject of contract negotiations. If an Applicant raises new or different issues, at the contract negotiation stage, this may result in contract negotiations with that Applicant being terminated.

Clause number	Preferred change	Reason for preferred change

## 14 List of Suggested Appendices

Below is a list of suggested appendices that are referred to in this application form.

Indicate if you have attached the suggested information. If it's not applicable to your submission, then write "NA" in the table.

We request that the Appendices should be attached as one combined PDF attachment. The appendices are in addition to the 100 page limit for this RFP response.

Appendix	Section reference	Attachment suggested	Attached?
A	2.1(s)	Confirm whether any support (e.g. written assurance) has been obtained from the shareholders, members or beneficiaries (as applicable) to show that they support this Application [Note: include any evidence as an attachment to this Application]	
B	3.1(m)	Confirm whether any support (e.g. written assurance) has been obtained from the shareholders, members or beneficiaries (as applicable) to show that they support this Application [Note: include any evidence as an attachment to this Application]	
C	3.6	Latest audited accounts Latest annual report	
D	7.4	Provide evidence that your cohort of students will choose to enrol in your proposed school Attach evidence to support this. For example, surveys you have undertaken letters of support from local parent groups, iwi or others	
E	8.1.2	If you plan to develop your own curriculum.....attach your curriculum handbook (if you have one)	
F	9.5	If resources are being donated or funded, please provide evidence to support this occurring	
G	10.2	If you have already developed community partnerships, please attach evidence of this (eg letters of support from parent groups, community groups, iwi, etc supporting the establishment and	



Appendix	Section reference	Attachment suggested	Attached?
		operations of your proposed school in the area).	
<b>H</b>	11.2.2	Provide written evidence of that property arrangement (e.g. a copy of the certificate of title or written evidence from the owner of any leasehold agreement)	
<b>I</b>	12.2 + 12.3	As per 2.8.3 of your EOI response, provide evidence of (additional financial and resource support) (eg letters from non-government funders/supporters detailing the level of support they will provide to the proposed school and when it would be provided).	
Other (specify)			
Other (specify)			

## 15 Applicant Declaration

Each Applicant is required to complete the following declaration. For joint or consortium applications each party must complete a separate declaration.

Topic	Requirement	Applicant's declaration
Application submitted on behalf of a Sponsor to be formed	If this application has been submitted by the Applicant on behalf of a Sponsor, the Applicant acknowledges and agrees that all statements and commitments made in this application, including the warranties given in this section, will be capable of being given (in some form) by the Sponsor still to be established	agree / disagree / not applicable
RFP response:	The Applicant has prepared this application independently to operate a partnership school.  OR jointly with [insert name of Applicant#2]  OR in consortium with [insert names of each consortium Applicants]	agree / disagree
RFP terms:	The Applicant has read and fully understands this RFP, and the RFP terms in part two of the Requirements and Rules of this RFP, and agrees to be bound by them.	agree / disagree
Collection of further information:	The Applicant authorises the evaluators: <ul style="list-style-type: none"> <li>to collect any information about the Applicant, from any relevant third party, including a referee, or previous or existing client, and</li> <li>to use such information in the evaluation of the Applicant's application.</li> </ul>	agree / disagree
Objectives and Requirements:	The Applicant has read and fully understands the nature and extent of what is required by the Ministry and the Minister as described in parts one and two of this RFP.  The Applicant has the necessary capacity and capability to fully meet or exceed the deliverables in the operation of a partnership school and will be available to operate their partnership school	agree / disagree

	throughout the proposed contract period.	
Proposed Contract:	<p>The Applicant has read and fully understands and accepts the Agreement terms and conditions as stated in the draft contract attached as Schedule 1 or has completed the table of proposed contract derogations in the form set out in the table at section 13 of this response form. If successful, the Applicant agrees to sign a contract based on the draft Contract or, if the Applicant has identified any proposed contract derogations, the Applicant agrees to sign a contract based on the draft Contract subject to negotiating those clauses identified in section 13 of this response.</p> <p>If a revised form of draft Contract is released to the Applicant during the RFP process, and the Applicant has updated their response to confirm their acceptance of the revised form of draft Contract or to request further amendments in accordance with section 13 above, the Applicant, if successful, agrees to sign a contract based on the revised form of draft Contract, or to sign a contract based on the revised form of draft Contract subject to negotiating any requested further amendments identified in its updated response.</p>	agree / disagree
Conflict of interest:	The Applicant warrants that it has no actual, potential or perceived conflict of interest in submitting this application, or entering into a contract to operate a partnership school. Where a conflict of interest arises during the RFP process the Applicant will report it immediately to the Contact Person.	agree / disagree
Ethics:	<p>The Applicant warrants that in submitting this application it has not:</p> <ul style="list-style-type: none"> <li>• entered into any improper, illegal, collusive or anti-competitive arrangements with any competitor</li> <li>• directly or indirectly, approached any representative of the Minister, Ministry or the Board to lobby or solicit information in relation to the RFP (except where allowed for during the clarification period).</li> <li>• attempted to influence, or provide any form of personal inducement, reward or</li> </ul>	agree / disagree

	benefit to any representative of the Minister, Ministry or the Board.	
Offer validity period:	The Applicant confirms that this application remains open for acceptance for a period of one year from the closing date.	agree / disagree
Publication of Application details	The Applicant accepts that, due to public interest associated to this application process, it is intended that the submitted application will be made publicly available on the Ministry of Education website, subject to any deletions that would be justified if the information had been requested under the Official Information Act 1982.	agree / disagree
Declaration:	<p>The Applicant declares that in preparing this Application it:</p> <ul style="list-style-type: none"> <li>• has provided complete and accurate information in all parts of the application, in all material respects</li> <li>• has secured all appropriate authorisations to submit this application and is not aware of any impediments to its ability to enter into a formal contract to deliver the outcomes.</li> </ul> <p>The Applicant understands that should it be successful in being awarded a contract with the Minister, the falsification of information, supplying misleading information or the suppression of material information in relation to this RFP will be grounds for termination of the contract.</p>	agree / disagree
<p><b>DECLARATION</b></p> <ul style="list-style-type: none"> <li>• This application has been approved, and is signed by, a representative of the Applicant who has the authority to do so. This representative is named below.</li> <li>• This representative declares that the particulars provided above and in the attached application documents are accurate, true and correct.</li> </ul>		
Signature:		
Full name:		

Title / position:	
Date:	