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1 Application Structure

1.1 Core Documents

1. This Request for Application is made up of two documents and a number of attachments as follows:
 - a) Part 1 – Application
 - i) Section 1 - Requirements and
 - ii) Section 2 – Rules and Standard Conditions of Application
 - b) Part 2 – Application Form
 - c) Attachments
 - i) Form of Notice of Intent to Respond
 - ii) Draft Agreement to operate a Partnership School
 - iii) Financial workbook
2. We strongly recommend you read and familiarise yourself with all documents, before you begin preparing your response.

1.2 Issuing Authority

3. This Request for Application to operate a Partnership School | School Hourua opening in 2017 is issued by the Ministry of Education for and on behalf of the Partnership Schools Authorisation Board and the Minister of Education.



Section 1 – Our Requirements

2 Introduction

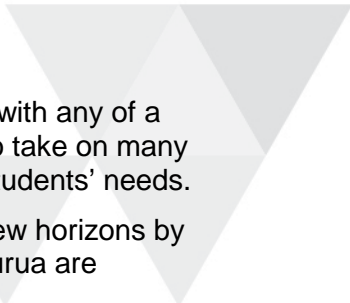
4. A Partnership School is a state-funded school whose sponsor contracts with the Government to meet specified, rigorous educational and organisational performance standards in return for freedom to innovate to do so. The concept provides an opportunity for educators to partner with communities, iwi, philanthropists and business organisations to raise achievement among priority students.
5. Partnership Schools are a key part of the Government's effort to raise student achievement, and meet the Better Public Services target of 85% of 18 year olds having NCEA Level 2 or an equivalent in 2017. Their mission is to use the greater level of flexibility and freedom available to them to lift the educational results of students who are not being well served by the education system.
6. Partnership Schools provide further options for these young people and their families, giving them the choice of a type of education that better suits their own specific learning needs.
7. This application provides potential sponsors an opportunity to set out how they would provide an outstanding educational programme that will engage their students and enable them to succeed.
8. The Partnership Schools | Kura Hourua Authorisation Board (Authorisation Board) and the Ministry of Education will use the information you provide in this application to evaluate both the quality of your proposal and your capacity to successfully establish and operate a Partnership School. Please carefully review all the documents provided with this application pack when preparing your application for submission.

2.1 Key Values

9. The key values of the Partnership School/Kura Hourua model are:
 - a) partnerships with other organisations
 - b) accountability to meet agreed standards including student academic achievement
 - c) focus on educational performance rather than facilities and property
 - d) flexibility to decide how Partnership Schools/Kura Hourua operate and use funding, and
 - e) high trust between the Minister/Ministry and sponsors in order to achieve the agreed outcomes.

2.2 Kura Hourua – the Name

10. Waka Hourua is the Maori name for the traditional sea voyaging double-hulled canoes used on expeditions where great distances needed to be travelled. The two hulls joined together created a stronger and more versatile vessel better able to cope with all of the challenges of the vast Pacific Ocean.
11. This is an apt metaphor for the journey of partnership the Government and community have embarked on with Partnership Schools. The partnerships between the sponsors and the Government, and the sponsors and their communities, are creating stronger, more versatile schools which are better able to meet their students' and communities' needs.

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12. Waka Hourua took many forms and shapes and were adorned with any of a range of special characteristics, just as Kura Hourua are able to take on many forms and shapes with special characteristics tailored to their students' needs.
 13. Waka Hourua were used for great voyages which sought out new horizons by following new pathways. This reflects the journey that Kura Hourua are undertaking within the New Zealand education environment.
 14. Kura Hourua is the term that has been chosen to best represent the intent behind Partnership Schools, with hourua encapsulating the notion of partnership and journeys, and Kura being the commonly used and known term for 'school'.
 15. Throughout this Request for Application we refer to Partnership Schools | Kura Hourua as Partnership Schools.



3 Overview

3.1 Expectations

16. Partnership Schools are expected to:
 - a) raise the achievement of Māori, Pasifika, students from low socio-economic backgrounds, and students with special education needs (the Government's priority groups of learners)
 - b) engage effectively with parents, family/whānau and communities to support and contribute to achieving high educational outcomes for their children
 - c) use the freedoms available through this model to lift the educational performance of these students
 - d) deliver high-quality educational programmes with a strong focus on performance
 - e) meet specified performance standards agreed with the Crown, including student academic achievement, and
 - f) have strong governance and the organisational capacity and capability required to ensure the high-quality management and operation of the school

3.2 What is a Partnership School?

17. A Partnership School is a state-funded school whose sponsor contracts with the Government to meet specified, rigorous educational and organisational performance standards in return for freedom to innovate to do so.
18. The concept provides an opportunity for educators to partner with communities, iwi, philanthropists and business organisations to raise achievement among priority students. They may be secular or faith-based. The schools have greater freedom with regard to school organisation, employment arrangements, curriculum, and teaching methods and practices.
19. These freedoms, enabled through the Education Act 1989, are intended to allow the schools to use fresh, innovative ways to engage with priority students and enable them to succeed.
20. We encourage you to look into how the first groups of Partnership Schools are developing when designing your own proposal.

3.3 Authorisation Board

21. The Minister of Education has appointed an Authorisation Board to provide advice and recommendations to the Minister on which applications should be considered for contracts.
22. The Board is also responsible for the monitoring of the educational performance and achievement of each Partnership School against the agreed outcomes, and providing advice to the Minister on how they are performing.

3.4 Sponsors

23. Successful Applicants (if any), will be approved by the Minister of Education to become the sponsor of a Partnership School.
24. The term sponsor is used in the wider sense of giving backing to the project and being responsible for delivering outcomes.

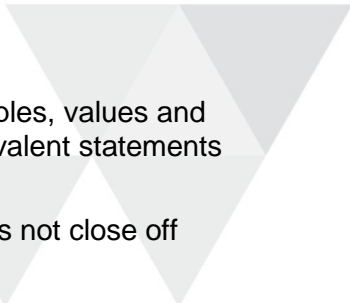
25. The sponsor must be a 'body' such as a board, trust, company or other legal entity. We encourage applications from organisations from a range of backgrounds including education providers, businesses, iwi, community organisations, faith-based groups, and culture-based educational organisations.
26. Please note that existing state schools and tertiary education institutions cannot be sponsors under the Education Act 1989. [Applicants should also note the Government preferences set out in section 4.3 paragraph 51 below].
27. Sponsors are able to operate multiple schools, providing they can demonstrate they have the capability and capacity to do so.
28. Sponsors can be not-for-profit or for-profit.

3.5 The Contract

29. Successful Applicants will sign a six year contract, with two further rights of renewal of six years each, with the Crown, and be accountable for delivering to specific performance standards.
30. The contract may be renewed or revoked based on the performance of the sponsor.
31. A draft version of the contract is included in this application pack, and we expect you to familiarise yourself with the content before preparing your application.
32. The Authorisation Board is responsible for overall monitoring of the Partnership School's educational performance.
33. The Ministry of Education administers and monitors the Partnership Schools contracts on an ongoing basis.
34. Failure to meet any of the performance standards may result in intervention and, where necessary, closure. If closure (as a result of breach or failure) occurs within the first few years of the opening of the school, we will be seeking repayment of a portion of the Establishment Funding provided.


3.6 Flexibilities and Freedoms

35. The Government is looking for sponsors who can make effective use of the flexibilities and freedoms offered by the Partnership Schools model. As you design your proposal, we encourage you to carefully consider how you can maximise these to best meet the needs of your target students and achieve the results required.
36. Partnership Schools can:
 - a) focus on a special interest (e.g. a particular language, vocational pathway, or other specialist area), apply a particular pedagogical philosophy, or adopt a faith or culture-based setting
 - b) provide religious instruction as part of delivering a full curriculum if they have a faith-based character
 - c) negotiate the number of teachers they employ who do not hold a Practising Certificate (e.g. employ individuals with post-graduate degrees or trades certificates who have not undertaken formal teacher training as subject matter experts to deliver part of the curriculum)
 - d) negotiate salary conditions and employment conditions with employees
 - e) employ a chief executive who does not hold a Practising Certificate
 - f) set the length of their own school day and year

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- g) set their own curriculum, providing it uses the vision, principles, values and key competencies of *The New Zealand Curriculum* or equivalent statements in *Te Marautanga o Aotearoa*
 - h) choose their own qualifications framework, providing it does not close off any future options for students, and
 - i) sub-contract any of the sponsor's responsibilities to a third-party.

3.7 Enrolment

- 37. Partnership Schools must accept all students who apply for entry, regardless of their background or ability. This means that any specialism on offer is a mode of learning rather than an entry criterion. For example, if you are proposing a programme specialising in sport, you will not be able to select students based on their sporting skills and experience. Your programme must be open to all those who wish to learn at a school specialising in sport.
- 38. Open enrolment also means that Partnership Schools cannot use testing (academic or physical) or any compulsory conditions as part of their enrolment processes. Any interviews prior to a place being offered should be for the purpose of enabling prospective students to find out more about the programme.
- 39. Partnership Schools must allocate places in accordance with section 158N of the Education Act. Please make sure that your proposed enrolment policy is consistent with the Act.
- 40. Unless the maximum roll is likely to be reached, applications must be accepted on a first come, first served basis.
- 41. Partnership Schools may wish to set a date by which applications for enrolment in the following year should ideally be received. All applications received by that date can then be considered together.
- 42. Once the maximum roll is likely to be reached (i.e. more applicants than there are places at the school), Partnership Schools proceed to a prioritisation process.
- 43. Partnership Schools must offer places in a specific order of priority:
 - a) first priority must be given to any applicant who is the sibling of a current student of the school
 - b) second priority must be given to any applicant who is the sibling of a former student of the school
 - c) third priority must be given to all other applicants
- 44. If there are more applicants in any of the priority groups than there are places available (e.g. five applications received when there are only three places available for the siblings of current students), selection within this priority group must be by ballot.
- 45. A ballot also allows for a waiting list to be created for use until the next cycle of applications takes place.
- 46. Partnership Schools cannot create their own priorities to replace or be in addition to the three set out in the Act. This means you cannot give priority to groups such as those living in a certain catchment, children of staff or governance board members, particular priority learners, or those with particular tribal affiliations.
- 47. The contract between the sponsor and the Crown specifies a target number of learners from the Government's priority groups to be enrolled by the Partnership



School. As you cannot refuse enrolments from any students, you will need to carefully consider how you will use engagement with the community and facilitation of enrolment to encourage learners from priority groups to enrol in your school.

3.8 Is there a maximum number of students that Partnership Schools can enrol?

48. Sponsors negotiate a roll number for any given year with the Crown as part of the contract. This is renegotiated annually with consideration given to:
 - a) evidence of parental demand for the school, and
 - b) successful delivery of the performance goals.

4 Evaluation and Decision-Making

4.1 Who evaluates the applications?

49. The Authorisation Board and the Ministry undertake a comprehensive evaluation process on behalf of the Minister of Education. This is outlined in more detail in Section 2 of this document.

4.2 What is being looked for when evaluating applications?

50. The Authorisation Board and the Ministry are looking for proposals that demonstrate:
- a) a clear commitment to raising the educational aspirations and results of Māori, Pasifika, students from low socio-economic backgrounds, and students with special education needs, and an understanding of the challenges involved
 - b) proven ability to attract these priority learner groups
 - c) a strong case for the need for a Partnership School to address educational underperformance by their target students in the proposed location
 - d) a compelling, clearly documented education programme that will deliver success for their target students, and evidence of the sponsor's capability for delivering the programme
 - e) innovative use of the flexibilities and freedoms on offer to Partnership Schools
 - f) an understanding of what is required to achieve success in education for their target students, and experience in doing so
 - g) proven organisational, governance and financial capability and competence, and
 - h) data and other evidence to support each of the key components of the proposal.

4.3 Government Preferences

51. In addition to the evaluation criteria described, the Government has set a number of preferences for this round of applications. While all high quality applications (as assessed against the evaluation criteria) will be considered, preference will be given to new Partnership Schools that:
- a) make effective use of the flexibilities offered by the model
 - b) offer effective, innovative options for 0-8 year olds
 - c) are large enough to be comfortably (economically) viable
 - d) are located in an area or areas where there are students who are not being well served by the education system
 - e) bring together education, business and/or community sector partnership(s)
 - f) have a focus on science, technology, engineering and mathematics
 - g) are not from existing private schools seeking to convert to a Partnership School.

Preference	Rationale
Schools that will make effective use of the flexibilities offered by the model.	The intention of the Partnership Schools initiative is to add value to the network by providing an additional schooling option that makes a significant difference for priority learners. The intention is not to replicate what is already on offer in the system, or to incorporate an existing school that may already be providing value.
Schools that offer innovative options for 0-8 year olds	This enables potential sponsors to propose a schooling solution that aligns the curriculum and pedagogy across early childhood and primary age groups.
Schools that are large enough to be comfortably viable	Partnership Schools must be financially viable. There are benefits of scale for students, including broader curriculum options and greater teaching specialisation. Scale also enables schools to deliver more of the core curriculum themselves at senior levels rather than relying on external parties.
Are located in an area or areas where there are students who are not being well served by the education system	This enables potential sponsors to use demographics and student achievement information on priority learners to demonstrate the need for a Partnership Schools in a particular location.
Bring together education, business and/or community sector partnership(s)	We encourage applications from potential sponsors that have a track record in developing and maintaining tangible partnerships with the business and community to maximise the success of the school, in both establishment and ongoing operation of the school.
Have a focus on science, technology, engineering and mathematics (STEM)	The allows potential applicants to propose a Partnership School that will provide 'best in class' pedagogical strategies in the teaching and learning of STEM subjects, creating pathways into a wide range of related careers.
Are not existing private schools seeking to convert to a Partnership School.	The government welcomes applications from potential sponsors who propose new and additional provision of education for their intended community.

4.4 Who will approve the Preferred Applicant(s)?

52. The Minister of Education makes the final decision on which Applicants are approved to open a Partnership School. The Minister takes into account the advice and recommendations provided by the Authorisation Board and the Ministry on which applications should be approved.

4.5 Performance Management

53. Partnership Schools have greater flexibility and freedom around school organisation, employment arrangements, curriculum, and teaching methods and practice. In exchange, they are held to a high level of account for delivering improved education results for their students.
54. Successful Applicants are expected to deliver to specific performance standards. These are detailed in Appendix II.
55. We expect you to carefully consider the performance management information provided below and in Appendix II when developing your proposal.

4.6 Student Achievement

56. Partnership Schools are expected to meet specific, rigorous performance standards relating to student achievement. This is to ensure they deliver excellent results for their students. The performance indicators and measures are based on the Government's targets for the education system, as well as measures that demonstrate student progression and added value.
57. Partnership Schools offering secondary provision are required to have measures based on the Government's Better Public Services target of 85% of 18 year olds having NCEA Level 2 or an equivalent in 2017. We anticipate this to be the minimum target. It could be set higher for some schools, depending on the specific offerings in the application.
58. Partnership Schools with students in Years 1-8 must report against the National Standards or Ngā Whanaketanga Rumaki Māori.
59. Partnership Schools are required to break down any targets to reflect data for the priority groups and their achievement (except where this would breach an individual's privacy).

4.7 Student Engagement

60. Student engagement is a prerequisite to high student achievement. Therefore, Partnership Schools have specific performance standards around ensuring a high level of attendance and providing a safe physical and emotional environment.
61. Please note that sponsors are legally required to make all reasonable efforts to ensure that an enrolled student attends school, and to provide a safe physical and emotional environment.

4.8 Mission Specific Objectives

62. Partnership Schools are expected to have a point of difference from state and state-integrated schools. We are looking for an innovative approach to education that works for those students who have not been well served by the education system.
63. Mission-specific goals are negotiated as part of the contract. For example, Partnership Schools that are based around teaching in a particular language and/or culture could be required to demonstrate how well their students are progressing in these areas. As another example, a Partnership School with a focus on preparing young people for work or further study could be required to demonstrate how successful those students have been in obtaining placements in suitable employment or higher education courses.

4.9 Financial management

64. Financial management standards measure the overall financial health of a Partnership School using common business standards. Indicators include the operating surplus, working capital ratio, debt/equity ratio, operating cash, and enrolment variance.

4.10 Organisational Management

65. Sponsors of Partnership Schools are required to meet all legal obligations under general and education law and the contract, while managing their school and focusing on achieving specified performance standards.

5 Funding

PLEASE NOTE

The funding model applicable to this round of Application is different from the first two rounds.

Applicants should give particular attention to this section to ensure a complete understanding of the available funding as set out below.

5.1 Overview

66. Partnership Schools receive funding covering the resourcing components provided to state and state-integrated schools – salaries, operations grant, property funding, and centrally-funded services (such as professional development and special education services). Sponsors of Partnership Schools have more flexibility to decide how they use this funding to meet their specific performance standards.

5.2 The Funding Model

67. The funding model for Partnership Schools is intended to give sponsors flexibility to manage their resources. When a Partnership School is at capacity it will provide a broadly similar level of funding to that for schools and students in the state system.
68. The funding model is made up of four parts as set out in the following table:

Funding	What it covers	What it is made up of	How often it is paid
Establishment Funding	A one-off payment to assist with establishing the school.	A fixed contribution towards setup costs plus a contribution towards property and a principal's salary.	One-off payable on signing contract or staged as agreed
Property Rate (per student)	An annual amount covering items such as a contribution to insurance, maintenance, and funding for modernisation, through a per student rate	This funding is based on the Cash for Buildings funding model. It has three components: <ul style="list-style-type: none"> Capital costs – site works costs, and the cost of constructing the building(s), including a furniture and equipment grant Maintenance costs – 40 years of operations grant property funding Modernisation costs – 30 years of five year agreement (5YA) funding This is then divided by the schools' proposed maximum roll to create a per student amount. Partnership Schools are then funded on the actual number of students enrolled multiplied by this per-student amount.	Quarterly
Teaching and Operating Rate (per student)	An annual amount covering teaching salaries and operational costs set as a	The model constructs a teacher salary rate that is applied to the staffing entitlement of a state school of a particular roll size, plus the average	Quarterly

	per-student rate.	operational per-student grant for a decile three school of the same size.	
Professional Development and Resources rate (per student)	An annual per-student amount of cashed-up funding that is a proxy for centrally-funded support to state schools	<p>This has been calculated by summing the cost of the centrally-funded services, and dividing by the number of students in the system.</p> <p>Examples of the support that has been cashed up include:</p> <ul style="list-style-type: none"> • itinerant and in-school specialist teacher assistance • professional learning and development • curriculum resources • Learning Experiences Outside the Classroom • Laptops for Teachers 	Quarterly

69. Partnership Schools are also eligible for entitlements that attach to individual students or schools such as transport assistance, Māori Language Programme Funding, and an allowance for isolated schools.
70. Assistance that will continue to be funded centrally (where applicable) is for students with moderate and high special education needs. This is a highly specialised service, and experts are not readily available across all parts of the country.

5.3 Determining the initial number of students for funding purposes

71. The property component of the Establishment Funding, and the first quarterly operational payment payable on a per student basis, will be based on an initial number of students that is agreed to by the parties.
72. Your application requires you to propose both a maximum roll and an opening roll. You are expected to support this with evidence that a real demand exists for a school of this size and nature in your proposed community.

5.4 Partnership Schools Funding Scenarios

73. As part of your application, you are required to calculate a total amount of funding for your proposal (excluding targeted centrally funded support services such as transport assistance or Māori language programme funding). Calculate the amount that is closest to your proposed roll.
74. Please note that the amounts provided are indicative only and are provided to allow you to prepare a high-level budget.

5.4.1 Primary School – Years 1-8

Example 1

Maximum roll of 150 with a starting roll of 50 students.

Roll	Amount/Rate
Establishment Funding	\$ 340,409
Property rate (per student)	\$ 992
Prime teaching and Operating rate first 50 students (per student)	\$ 8,579

Marginal teaching and operational rate for 51 st and each additional student (per student)	\$ 5,247
Professional development and resources rate	\$ 276

Example 2

Maximum roll of 200 with a starting roll of 50 students.

Roll	Amount/Rate
Establishment funding	\$ 339,331
Property rate (per student)	\$ 949
Prime teaching and Operating rate first 50 students (per student)	\$ 8,579
Marginal teaching and operational rate for 51 st and additional student (per student)	\$ 5,247
Professional development and resources rate	\$ 276

5.4.2 Secondary School – Years 9 -13

Example 3

Maximum roll of 200 with a starting roll of 75 students.

Roll	Amount/Rate
Establishment Funding	\$ 576,258
Property rate (per student)	\$ 2,951
Prime teaching and Operating rate first 100 students (per student)	\$ 12,585
Marginal teaching and operational rate for 101 st and additional student (per student)	\$ 7,046
Professional development and resources rate	\$ 276

Example 4

Maximum roll of 300 with a starting roll of 100 students.

Roll	Amount/Rate
Establishment Funding	\$ 585,007
Property rate (per student)	\$ 2,388
Prime teaching and Operating rate first 50 students (per student)	\$ 12,585
Marginal teaching and operational rate for 51 st and additional student (per student)	\$ 7,046
Professional development and resources rate	\$ 276

5.4.3 Composite School – Years 1-10

Example 5

Composite school with a maximum roll of 300 students being made up of 200 years 1-8 (primary) students and 100 year 9 -10 (secondary) students, and an opening roll of 50 primary and 25 secondary students.

Roll	Amount/Rate
Establishment Funding	\$ 396,928
Property rate (per student)	\$ 1,506
Prime teaching and operating rate first 33 primary students (per student)	\$ 8,579
Prime teaching and operating rate first 33 secondary students (per student)	\$ 12,585

Marginal teaching and operational rate for 34 th and additional primary student (per student)	\$ 5,247
Marginal teaching and operational rate for 34 th and additional secondary student (per student)	\$ 7,046
Professional development and resources rate	\$ 276

5.5 ECE Funding

75. The Partnership Schools funding model does not provide for the provision of ECE services. If you are proposing integrated provision for 0-8 year olds, you will need to estimate the funding that would be received for the ECE component of your budget using the amounts provided for in the funding handbook for the ECE sector –

<http://www.lead.ece.govt.nz/ManagementInformation/Funding/FundingHandbook.aspx> .

Or

<http://www.education.govt.nz/news/funding-handbook-update-april-2015/>

Also see section 8.3.

Note: The Ministry is currently transitioning to a new website so both links are provided for your use.

5.6 Non Government Investment

76. To deliver on the proposed school 'vision and mission', and the educational achievement contemplated under this agreement, you might need to secure additional funding and support, in cash or kind, from other parties in your community.
77. It is important that you consider this carefully, if such funding is likely to be required, and provide clear evidence of the secured non-government investment that forms part of your proposal.
78. We understand that securing this kind of support might need to be undertaken during the establishment phase, if your application is successful. Where this is the case, we expect you to detail your realistic and achievable plans to accomplish this. You should be aware that should your application be approved, such approval may be conditional on your securing the required support.

6 Public Release of Information

79. The information you provide in your application is subject to the Official Information Act 1982. It will be released publicly by the Ministry on its website as part of ensuring the transparency of the application process.
80. The Ministry will advise you of the information relating to your application that will be released, so that you are able to inform others involved in your application, including any third parties, ahead of time.
81. It is anticipated the following information will be released during the evaluation period of this application process:
 - a) Application close date – release of names and related details of applicants who submitted a proposal for evaluation; and
 - b) Contract award (for successful applicants) – publication of all received applications, subject to any deletions that would be justified if the information had been requested under the Official Information Act 1982.

7 Where to Go for Information

82. When preparing your application, you should carefully consider and where appropriate utilise the wide range of data and other information available. This is particularly important if you are seeking to build a strong case as to why your proposal meets any of the Government's preferences.

7.1 Population Data


83. Population data is available through Statistics New Zealand and local councils. It is important to note that overall population change in a particular area may not mirror changes in the school age population.
84. We expect you to use demographic information to demonstrate the need in the community where you propose establishing a Partnership School.
85. Ministry information indicates the following general trends across the country:
- The proportion of school-aged children in the total population is expected to decline over time due to an ageing population and a decreasing fertility rate.
 - The school-aged population is expected to change in terms of where it is located and its ethnic make-up.
 - Urban drift means that our cities are expected to increase in population and the rural areas are expected to decline.
 - Significant school age population growth is expected in Auckland, particularly in the south of the city.
 - Māori and Pasifika populations will increase at faster rates than the average population.
 - There is a secondary cohort peak that is moving out of secondary school. Year 9-13 rolls are expected to trough then build again for about 2020.
 - The Year 1-8 cohort is building as a 'baby blip' adds to the lower years of the cohort.

7.2 Public Achievement Information

86. Public Achievement Information (PAI) is information about students, schools and the education system. It can be found at:
<http://www.educationcounts.govt.nz/topics/pai-pipeline/>
87. PAI includes information about how New Zealand's education system is progressing at national, regional and local levels.
88. We expect that you will use PAI information to:
- support your proposal for establishing a Partnership School in your proposed location, and
 - demonstrate how your school will contribute to raising the achievement of your target students.

7.2.1 PAI Pipeline

89. The PAI Pipeline provides key statistics from ECE through to 18 years of age. It shows the progress being made at a national and regional level against important measures such as participation in ECE, progress and achievement in National Standards and Ngā Whanaketanga Rumaki Māori, and the percentage of students gaining key NCEA qualifications by the time they leave school.

- 
90. It also shows where there are issues of inequity, and what improvements are needed across the education system.

7.2.2 Education Profiles

91. Education profiles have been prepared at territorial authority, regional and national level. They give an indication of how the education system is working at each of these levels.

7.3 Education for 0-8 year olds

92. If you wish to put forward a proposal offering innovative options for 0-8 year olds, you need to be aware that:
- a) You must meet the Early Childhood Education (ECE) licensing requirements for the ECE component of your proposal – <http://www.lead.ece.govt.nz/ServiceTypes.aspx>
Or
<http://www.education.govt.nz/early-childhood/running-an-ece-service/the-regulatory-framework-for-ece/licensing-criteria/>
 - b) You must meet the ECE Regulations for the ECE component of your proposal – <http://www.lead.ece.govt.nz/ManagementInformation/RegulatoryFrameworkForECEServices.aspx>
Or
<http://www.education.govt.nz/early-childhood/running-an-ece-service/the-regulatory-framework-for-ece/>
 - c) You will receive ECE funding for the ECE component of your proposal - <http://www.lead.ece.govt.nz/ManagementInformation/Funding.aspx>. or <http://www.education.govt.nz/early-childhood/running-an-ece-service/funding/> This needs to be taken into consideration when responding to the relevant financial questions in the application form.
 - d) Your application will need to demonstrate how you propose to align the curriculum and pedagogy across the age groups to deliver seamless provision.

Note: The Ministry is currently transitioning to a new website so both links are provided.

8 Guide to Completing the Application

93. This section is provided as guidance to Applicants when responding to this Request for Application.

8.1 Overview

94. Your Application should set out how your school's particular approach to teaching and learning will raise student achievement for priority learners in your community. The application process is competitive, so you should ensure that you have thoroughly read this document for information on how to complete the application forms.

8.1.1 Please Note:

95. Your completed Application **must not exceed 100 pages**, including any supporting attachments (such as draft school policies). The following information does not count toward the page limit:
- Cover page
 - Table of contents
 - Notice of Intent to respond
 - Applicant contact details
 - Application questions, criteria and guideline information contained in each section of this application form
 - Assumptions, risks and caveats
 - Applicant organisation overview
 - Applicant declaration
 - Applicant checklist.
96. Although guidance information is provided for each section, you should be aware of the principles of successful Partnership School applications before you start filling in the application forms. Ensuring your application complies with these principles will give your application the greatest chance of success in the competitive selection process.

8.2 What makes a successful application?

97. At the heart, Partnership Schools are about raising student achievement for priority learners. Partnership Schools are offered increased flexibility over regular state schools in return for achieving specified educational standards. This means that you have the freedom to identify the educational approach that best meets the needs of your particular community.
98. Successful applications will be able to demonstrate a unique and aspirational vision, a sound educational offering, preferably supported by experience, and the organisational capacity and capability to ensure the school is well run and well led. There is no one way to achieve this, but the following information should give you an indication of what will be required.
99. It is not enough to simply state that a new schooling approach is needed in your community. Instead, you must be able to make the case that *your* particular school is needed by highlighting how your approach will meet the needs of your community. Your application must be able to demonstrate that you have

identified the educational, cultural and social needs of your community and developed a school structure that will enable you to overcome any barriers to achievement. For example, if you have highlighted that students in your community are not achieving in literacy, you should set out what mechanisms and instructional practices you will put in place to overcome this.

100. Providing supporting evidence is a key hallmark of a successful application. The best applications use evidence to underpin their claims, and interrogate the data to form strong conclusions. You will not be able to score higher than 2 (Minor Reservations) for the majority of questions without effective use of evidential data. The types of evidence required will vary, but may include student achievement data, demographic data and research into the efficacy of educational approaches.
101. In addition to supporting evidence, you will need to ensure that you have provided a full explanation and justification for selecting the key features of your school. For example, if you plan to use an alternative curriculum, you must fully explain and justify why you have done so by explaining why this approach will be more effective for your student cohort. You must also explain, if applicable, how and over what timeframe this curriculum will be developed and implemented. Conversely, if you plan to use the New Zealand Curriculum or Te Marautanga o Aotearoa, you should also explain why this is the most effective curriculum for your students.
102. Do not simply state that you plan to do something; make sure that you have provided a cogent rationale for selecting this course of action. Broad statements such as 'we plan a holistic approach' need to be supported with specifics. The more effectively you make the argument for your particular Partnership School, the more likely you will be to be successful.

8.3 What makes a strong vision

103. The purpose and goals section is one of the most important aspects of your application. Your mission and vision is the driving force behind the school, and a strong vision will provide the platform for a successful application. This section should be focused and aspirational. Your vision should respond to each question in full.
104. Your vision sets out the “*why, where, and how*” of your application. You must be able to make a strong argument as to why your particular school is needed in your community, and how you will overcome any barriers to achievement that you have highlighted. To explain the “*why and where*”, consider asking the following questions:
 - a) What are the current schooling options for students in our community? Are these options sufficient to meet the needs of priority learners?
 - b) What is the level of student achievement in our community? Is it higher or lower than other similar communities?
 - c) What are the educational barriers facing our students? What areas for improvement does the evidence highlight?
 - d) What are the unique aspects of our community that might indicate a different approach is needed?
105. Once you have established the local context, this should give you an insight into how your school should be structured to meet the needs of your students. This leads on to the “*how*”: how you will make a difference for students in your community. For example, if you have identified that students in your community are not achieving due to poor literacy levels, you might consider a schooling

model that prioritises literacy. There must always be a strong rationale for selecting the key features of your school: do not simply select a feature without good reason. In essence, your school should be a focused response to a highlighted need in your community.

8.4 Educational Plan

106. The educational plan is the heart of your application, and represents 35% of the overall score. The aim of this section is to showcase your particular approach to teaching and learning, and make a case for the efficacy of your chosen methods. You will not be able to produce a successful application without a strong educational plan, so you must ensure that you have addressed every question in full, provided evidence to support your approach and fully justified all your selections. Your educational plan should be reflective of your vision and clearly driven by the student profile you set out in Section 4. The educational plan has three main components.

8.4.1 Curriculum

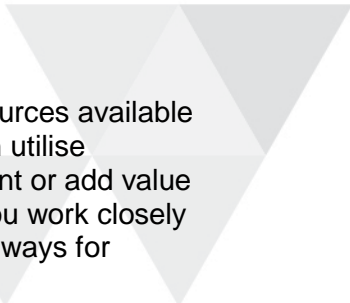
107. The educational plan sets out in more detail how you propose to achieve the vision you set out in the previous section. Here, you will set out details of your chosen curriculum and your rationale for choosing this approach. Consider asking the following questions:
- What is the likely student cohort of the school? What are their unique needs or special interest areas?
 - Is the New Zealand Curriculum the best curriculum for meeting these needs and interests? If yes, why are these students not achieving with this curriculum in their current learning environment?
 - If you are using an alternative curriculum, why is this the best option for your students? Is there evidence to suggest this curriculum will support improved outcomes for these students?

8.4.2 Approach to teaching and learning and day-to-day operation of the school

108. You must set out the philosophies, methods and techniques that underpin your approach to teaching and learning. Again, this should be reflective of your school's vision and the likely student cohort. Consider the following questions:
- How will you ensure that priority students are engaged, attending and behaving well at school?
 - How will you ensure that the principles of your vision are upheld in the classroom?
109. Once you have settled on the core principles that underpin your approach to teaching and learning, you can begin to set out how the school will operate on a day-to-day basis. A key aspect of this section is being able to explain the "why". Don't simply state that your methods will be effective, explain why this is the case, and provide evidence to support your arguments.

8.4.3 Partnerships

110. Partnerships with parents and community groups, philanthropic, business and other bodies and agencies are one of the key potential differentiating factors for your application. Here, you have a great opportunity to show innovation and demonstrate how well you know your local community. This section should be



about promoting engagement and taking advantage of the resources available within the community. You should also think about how you can utilise partnerships to create new opportunities for student achievement or add value to your educational offering. Consider the community groups you work closely with: how can you best harness their expertise? What new pathways for students can you develop?

8.5 Business Plan

111. The Business Plan section sets out the operational framework for your school. In this section, you should be able to demonstrate that your organisation has the capacity and capability to set up and run an effective school that supports improved outcomes for priority learners. The Business Plan has three main sections.

8.5.1 Governance and Management

112. This section sets out how you will organise your school to ensure accountability and transparent governance. Consider what structures you can put in place to ensure that effective oversight is maintained. For example, you should consider how you will differentiate between governance and management of the school. How will you manage conflicts of interest that arise? How will you escalate issues through layers of governance to ensure a positive outcome?
113. You will also need to consider the role of the sponsor in the ongoing operation of the school. Will there be a split between the sponsor and the governance board? How will each party work together to ensure success in the school? You will need to be explicit in this section, and provide evidence to support your claims. There should be a focused rationale for adopting a particular model of governance, and this should reflect the principles of your vision where applicable.

8.5.2 Finance

114. The Finance section sets out how your proposed funding (based on the information provided and other funding sources if applicable) will be invested over the first three years of the school's operation. You should provide clear descriptions of the assumptions you are making on the costs to operate your school.
115. Assessors will be looking for proposed budgets that demonstrate your understanding of the true costs of operating your school, and your financial management capability.

8.5.3 Premises

116. This section sets out where your school will be located if it is approved to open. If you have already identified a site for your school, whether permanent or temporary, you should give as much detail as possible, including any plans that are available. Assessors will be looking for premises that appear fit-for-purpose and meet minimum requirements. If you have not identified a site, you should focus on highlighting the options available to you, the steps you will take to secure a site, and the timing.

8.6 Operations Plan

117. This section sets out how your school will be run should it be approved to open. This is a key section in demonstrating that your idea is well thought out – you will not be successful unless you can demonstrate that your vision and educational plan will be achievable in practice. One of the most important aspects of this section is explaining the strategies that you will put in place to ensure the smooth running of the school.
118. You must ensure that you have devoted sufficient attention to both policy and strategy. For example, if you are asked about your policy for teacher recruitment, you should communicate not only the tasks associated with recruiting high-quality teachers, but also your strategy for achieving this in practice. It is not sufficient to simply state that you plan to do something; you must also explain how and when you will ensure this happens in practice.
119. A number of questions in this section relate to existing legislation and/or regulations. Before you answer these questions, you should ensure that you are fully acquainted with your legal requirements. Demonstrating that you are aware of the legal framework that supports effective schooling will ensure that your organisation is seen as having the requisite capacity and capability to set up and run a Partnership School.

9 Further Information

120. Here is a list of websites that might assist you to prepare your application.

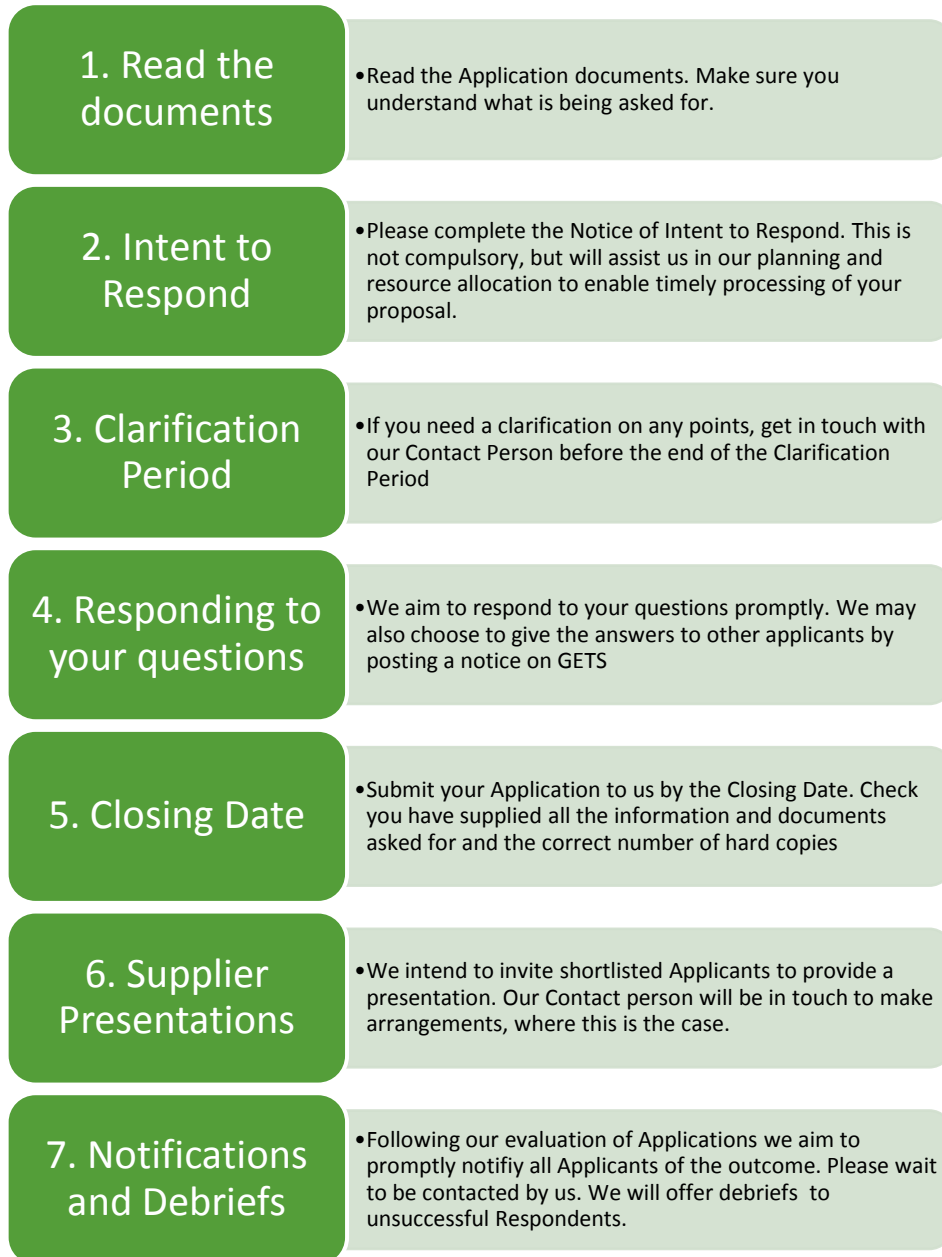
Subject	Website
Ministry of Education	
Partnership Schools	http://www.education.govt.nz/ministry-of-education/specific-initiatives/partnership-schools-Schools-hourua/
Ka Hikitia - Accelerating Success 2013-2017	http://www.education.govt.nz/ministry-of-education/overall-strategies-and-policies/the-maori-education-strategy-ka-hikitia-accelerating-success-20132017/
Tau Mai Te Reo	http://www.education.govt.nz/ministry-of-education/overall-strategies-and-policies/tau-mai-te-reo-the-maori-language-in-education-strategy-2013-2017/
New Zealand Curriculum	http://nzcurriculum.tki.org.nz
Pasifika Education Plan 2013 – 2017	http://www.education.govt.nz/ministry-of-education/overall-strategies-and-policies/pasifika-education-plan-2013-2017/
Priority Learners	http://nzcurriculum.tki.org.nz/Priority-learners
Ruia: School – Whānau Partnerships for Māori Learners' Success	http://partnerships.ruia.educationallleaders.govt.nz/
Ruia: Teacher Appraisal for Māori Learners' Success	http://appraisal.ruia.educationallleaders.govt.nz/
Stand-downs, suspensions, exclusions and expulsions guidelines	http://www.education.govt.nz/school/managing-and-supporting-students/student-behaviour-help-and-guidance/stand-downs-suspensions-exclusions-and-expulsions-guidelines (part one) http://www.education.govt.nz/school/managing-and-supporting-students/student-behaviour-help-and-guidance/stand-downs-suspensions-exclusions-and-expulsions-guidelines-part-2/ (part two)
Te Marautanga o Aotearoa	http://tmoa.tki.org.nz
Maori medium assessment position	http://tmoa.tki.org.nz/Mataiako/Aromatawai
Education Review Office	
Priority Learners in New Zealand Schools	http://www.ero.govt.nz/National-Reports/Evaluation-at-a-Glance-Priority-Learners-in-New-Zealand-Schools-August-2012
Review processes	http://www.ero.govt.nz/Review-Process
Education Council New Zealand	
Registered Teacher Criteria (Practising Certificate)	www.teacherscouncil.govt.nz/content/practising-teacher-criteria
Tātaiako: Cultural Competencies for Teachers of Māori Learners	http://www.teacherscouncil.govt.nz/required/tataiako.stm



Section 2 - Rules

1 Process overview

1. The following flow chart provides the generic RFA process overview. The actual process and specific dates are contained in this document (Section 2 - Rules - 3 Next steps).



2 Preparing an Application (Summary)

2.1 Preparing your Application

2. Applications must follow the format set out in this RFA Section 2 - Rules part 5 Notes to completing the Application. Applicants must provide in their Application all of the information requested, and in the format specified in this RFA or in response to any clarification question.
3. Please print Applications double-sided if possible. Please minimise the use of non-recyclable or non-reusable materials, such as plastic report covers, plastic dividers, vinyl sleeves and binding materials. Two-ringed binders, glued materials, paper clips and staples are acceptable. Applications should be submitted in a format that allows for easy removal and recycling of materials.
4. Failure to provide all of the information requested could result in the Application being rejected as non-conforming.

2.2 Clarification Period

5. Each Applicant must satisfy itself as to the interpretation of the RFA, and should, if there is any perceived ambiguity or uncertainty in the RFA documents, seek clarification.
6. During the period from the date the RFA is issued to the deadline for Applicants' questions, stated in the RFA – Section 2 - Rules part 0
7. (Last date for Applicant Clarifications), Applicants may seek clarification on any matter regarding the RFA or request additional information from the Contact Person.

2.3 Joint Applications

8. Applicants may submit collaborative or joint Applications, so long as the requirements of this RFA are met. Any joint Application must clearly identify:
 - a) all of the parties who are submitting the joint Application;
 - b) the nature of the relationship between the parties for the purpose of the joint Application;
 - c) confirmation that all parties are committed to the relationship and the joint Application;
 - d) the specific parts of the Requirements each party will be responsible for delivering
 - e) which party, parties or other legal entity will ultimately be the Sponsor for the purposes of the agreement to be entered into with the Minister;
 - f) the structures set up by the parties that support good governance and accountability and financial and contract management; and
 - g) be signed by all parties.
9. In evaluating a joint Application the Ministry or the Board may take into account any complexity or risk presented by a joint Application.
10. A joint Application must be a genuine joint venture with the services to be performed for the operation of a Partnership Schools being provided on a joint and fully integrated basis.

2.4 Language and price

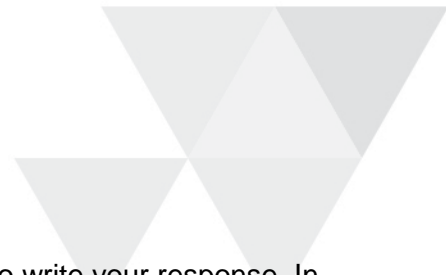
11. Applications must be in English and prices must be quoted in New Zealand dollars exclusive of goods and services tax (GST).

2.5 Application costs

12. Each Applicant must meet all of its own costs associated with the preparation and presentation of its Application and any negotiations.

2.6 Offer validity period

13. Applications shall remain valid and open for acceptance for a period of one hundred and eighty (180) days as calculated from the Closing Date (30 October 2015).



3 Next steps

3.1 Understand the requirements

14. Make sure you fully read this document before starting to write your response. In particular develop a strong understanding of the Requirements and how your proposal will be evaluated (Refer Section 2 - 4.1 How your Application will be evaluated). If anything is unclear or you have any questions then please email the Contact Person for further information.

3.2 The process

15. As this is a contestable and competitive Application we have set out a step-by-step process for Applicants to follow as well as some rules. Make sure you follow our process and abide by the rules. Remember, it is important when preparing your Application to use the Applicant Response Form and complete the Applicant Declaration. Having done the work, don't be late in submitting your proposal – you must get your proposal to us by the closing date.

3.3 Changes to the process

16. If we need to change anything about this process or want to provide Applicants with additional information we will let all Applicants know by placing a notice on the Government Electronic Tenders Service (GETS) at www.gets.govt.nz. If you downloaded this Request for Application from GETS you will automatically be sent notifications of any changes.

3.4 Our Contact person

17. Please direct all enquiries to our Contact Person listed below. You must not attempt to gain information from any other Ministry employee or Board member.

Drew Preddy

Partnership Schools | Schools Hourua Application

Email: partnership.schools@minedu.govt.nz

3.5 Our address for proposals

18. Proposals must be submitted to the following address:

For Applications sent by post:

Application to operate a Partnership
School | Schools Hourua

Attention: Drew Preddy

Ministry of Education

PO Box 1666

Wellington 6140

For Applications delivered by hand or courier:

Application to operate a Partnership
School | Schools Hourua

Attention: Drew Preddy

Ministry of Education

Level 3, 45-47 Pipitea Street

Wellington 6011

19. **Please note:** proposals sent by fax or email will not be accepted

3.6 Our timeline

20. The following information sets out our process and indicative timeline.

Activity	Completion Date
Application Issue Date	14 August 2015
Applicant Clarification Period begins	14 August 2015
Notification of Intent to Respond due	25 September 2015
Last date for Applicant Clarifications	8 October 2015
Last date for response to Applicant Clarifications	12 October 2015
Application Closing Date	30 October 2015 12:00 noon.
Evaluation of Written Applications (including clarifications, if any)	November 2015
Shortlisted Applicant Interviews (see note)	Dec 2015 /Jan 2016
Reference Checking and related enquiries	Dec 2015 /Jan 2016
Notification of Preferred Applicant(s)	February 2016
Contract Negotiations	TBC
Contracts Signed	TBC
School opened (no later)	February 2017

21. Please note:
- All times are in New Zealand time. The Authorisation Board reserves the right to alter the timeline, if required.
 - Shortlisted Supplier Interviews: if you are invited to an interview, you will be required to present at a location to be determined at the time. It is intended that interviews will be held over a one week period, with time slots given on a first-in, first-served basis.
 - A site visit may also take place.

3.7 Submission of Applications

22. All Applications must be received by the Application Closing Date stated above. Applicants must submit paper copies of their Application and upload an electronic submission of all documents comprising the full application onto www.gets.govt.nz.
23. **Nine** paper copies of the Application document (two copies to be provided unbound or stapled please) and **Two** paper copies of the excel spreadsheet regarding financial details must be submitted in accordance with the RFP rules (Section 2 - Rules part 6 Standard Terms).
24. If there is inconsistency between the paper and electronic copy of your Application, we will use the paper copy as the basis of our evaluation of your Application.

3.8 Application Validity Period

25. Proposals shall remain valid and open for acceptance for a period of not less than 180 days as calculated from the Closing Date.

3.9 The rules

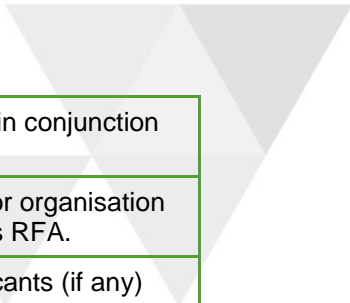
26. This Application is subject to the standard conditions provided in Section 2 - Rules part 10 General terms of this RFA document

3.10 Interpreting this Request for Application

27. Words starting with capital letters can have special meaning. When used in this Request for Proposal the following words in bold have the meaning described

Authorisation Board (the “Board”)	The Authorisation Board is an advisory body appointed by the Minister to advise the Minister of Education in relation to: the approval of sponsors under Section 158B of the Education Act; and the educational performance of Partnership Schools.
Business Day	A day when most businesses are open for business in New Zealand. It excludes Saturday, Sunday and public holidays. A Business Day starts at 8.30am and ends at 5pm.
Minister of Education (the “Minister”)	The Minister of Education (Minister) is the purchaser of the Requirements. The Minister is the Sovereign in right of New Zealand who acts by and through the government of New Zealand
Ministry of Education (the “Ministry”)	The Ministry of Education (Ministry) provides secretariat services to the Board, advises the Minister on all education matters, is responsible for administering the Application process and supporting the implementation of contracted outcomes (if any).
Clarification Period	The period within which any Applicant can ask for a clarification or additional information in relation to the Application.
Closing Date	The date when Applications must be delivered to the Board's nominated representative (other than in exceptional circumstances), as set out in paragraph 0 of Section 2 - Rules.
Competitor	A person or organisation that is in competition with an Applicant to operate a Partnership Schools now, or in the future.
Conflict of interest	A conflict of interest happens if an Applicant (or any employee of the Applicant): <ul style="list-style-type: none">• has any obligation to another person that would limit the Applicant's right or ability to perform its obligations under any Contract with the Minister; or• has any other interest which would be likely to adversely influence the Applicant's performance of its obligations under any Contract.• A Conflict of Interest means that the Applicant's independence, objectivity or impartiality can be called into question. A conflict of interest may be:

	<ul style="list-style-type: none"> • actual: where the conflict currently exists • potential: where the conflict is about to happen, or could happen, or • perceived: where other people may reasonably think that an Applicant is compromised.
Confidential Information	<p>Information that:</p> <ul style="list-style-type: none"> • is by its nature confidential • is marked by either the Board, the Ministry or an Applicant as 'Confidential', 'Commercially Sensitive' • is provided by the Board, the Ministry, an Applicant, or a third party 'In Confidence' • the Board, Ministry or an Applicant knows, or ought to know, is confidential • is of a sensitive nature, or commercially sensitive to the Board, Ministry, an Applicant or a third party.
Contact Person	The appointed official who is the single point of contact for all Applicant enquiries and other matters relating to this RFA.
Contract	The legally enforceable written contract for the operation of the Partnership Schools arising as a result of this RFA.
Draft Agreement	Means the Partnership Schools Key Agreement Terms and Principles attached as Schedule 1 to this RFA.
Evaluation Criteria	The criteria used by the Board to evaluate Applications.
Expense	Any actual and reasonable out-of-pocket costs that will be incurred by the Applicant in the delivery of the Requirements.
GETS	Government Electronic Tenders Services www.gets.govt.nz
GST	The value added tax under the Goods and Services Tax Act 1985, as amended.
Intellectual Property	An intangible asset that consists of human knowledge or ideas. Some examples are patents, copyrights, trademarks, design, software and similar industrial, commercial or artistic property.
Partner / Subcontractor	A named party (person or organisation) working in collaboration with or under a sub-contracting arrangement with the Applicant to deliver the service.
Preferred Applicant(s)	The Applicant(s) have been approved by the Minister, to enter into negotiations, with a view of being awarded a contract.
Application	A written offer submitted in response to this RFA.
Recommended Applicant(s)	Following the evaluation of Application(s), the Applicant(s) whose Application(s) have been ranked overall as the top scoring Application(s) and are recommended to the Minister to be considered for Preferred Applicant status.
Request for Application (RFA)	Request for Application (RFA) is this document, including all its parts. It is an invitation to all Applicants to submit an Application.
Requirements	The services more fully described in Part 1 Our Requirements of this RFA



Schedule	Any schedule to this RFA that is to be read in conjunction with this RFA.
Applicant	A person, business, partnership, company or organisation that submits an Application in relation to this RFA.
Successful Applicant	Following successful negotiations the Applicants (if any) who are awarded a contract.
\$ - Dollars	Unless otherwise stated all currency is in New Zealand dollars, and exclusive of GST.

4 Evaluation Process



4.1 How your Application will be evaluated

28. It is intended that the evaluation process will include the following phases:
- a) initial evaluation of the Executive Summary;
 - b) detailed assessment of Application against the Evaluation Criteria;
 - c) extent of acceptance of the Draft Agreement for Service;
 - d) each Application allocated an initial evaluation score;
 - e) requests for clarification and/or additional information from Applicant(s) (if required);
 - f) evaluation scores amended or confirmed (including assessment against the Government's priorities) and a short list of Applicants determined;
 - g) if required, assessment of short-listed Applicants by interview, based on a meeting agenda provided by the Contact Person;
 - h) if desired, a site visit will be conducted;
 - i) evaluation score updated and a revised (if any) list of Recommended Applicants determined;
 - j) reference checks for Recommended Applicant(s) confirming their capability and capacity with nominated referees;
 - k) evaluation score updated and a revised list of Recommended Applicant(s), (if any), determined;
 - l) Recommended Applicants (if any) evaluated against the Government's priorities and ranked;
 - m) Recommended Applicant(s) considered for approval by the Minister;
 - n) Minister approves Preferred Applicant(s)
 - o) contract negotiations with Preferred Applicant(s);
 - p) awarding of Agreement to Successful Applicant(s) (if any), in the agreed form; and
 - q) execution of Agreement with Successful Applicant(s) (if any), in the agreed form.

Note: The Minister is under no obligation to award any contract to any Applicant if satisfactory agreement cannot be reached.

Note: The evaluation team may undertake due diligence relating to any Applicant(s) at any time during the evaluation process, including the reference checks referred to above. This process will be managed by the Ministry.

4.2 Evaluation Weightings by Category

29. The following table sets out the weightings that will be applied to the assessment of compliant Applications.

Category	Information	Weight
Applicant Profile	General information about the Applicant and their partners, describing nature of business, commitments and established quality and related systems.	Risk Assessment
Purpose and Goals	Describes the Applicant's reasons for wanting to operate a school, and provides the distinctive purpose and the performance goals it proposes to achieve.	15%
Education Plan	Details around how the school will be structured, the learning experience students will have there, and how they intend to evaluate the performance of individual students and the school as a whole.	35%
Business Plan (excluding financial forecast)	Details of how the school will be managed, students recruited, accommodated and funded.	17.5%
Operational Plan	Details covering the Applicant's proposed student policies and procedures, personnel and quality health and safety systems.	17.5%
Financial (as contained within section Business Plan)	Details of the proposed budget and associated financial considerations.	15%
Agreement	Feedback from Applicants in relation to the draft agreement provided with or soon after release of RFA.	0%
Total		100%

4.3 Summary evaluation criteria by question

RFA Section/Question	Section Name	Description
4. Executive Summary		
Q1	Executive Summary	This criterion seeks to establish the school's particular vision and mission and state its performance goals, and to summarise succinctly all the key, distinctive features of the proposal. An initial assessment will be made on the basis of this summary.
5. Statement of Purpose and Goals		
Q2	Statement of Purpose and Goals	The statement of purpose articulates the reason for the opening of the school. This criterion seeks to establish the distinctive vision and mission, defines the school's performance goals and how these will be achieved, and outlines the Applicant's perceived advantages and how these will meet or exceed the required outcomes.
6. Educational Plan		
Q3-7	Curriculum	Applicants are required to demonstrate: <ul style="list-style-type: none"> a thorough understanding of the curriculum they propose to use; clear rationale as to why it has been

RFA Section/Question	Section Name	Description
		<p>proposed and if not the NZC or TMOA, how it aligns with the key elements of one of these;</p> <ul style="list-style-type: none"> • how it will be delivered to each year level; and • how it will meet the needs of the proposed student population.
Q8-12	Learning environment and teaching	<p>Applicants are to detail their proposed instructional methods, identifying any distinctive approaches and how these will deliver the anticipated educational outcomes. Applications are required to demonstrate how their learning environment and teaching practice will support the engagement with, and address the needs of, the Government's priority groups.</p>
Q13-14	Student progress and achievement	<p>This criterion seeks to assess the qualifications that will be offered by the school, how these will be measured, tracked and reported, and how assessments / aromatawai will be used to tailor instruction to student needs and improve student outcomes.</p>
Q15	Parent / Family / Whānau / Community Involvement	<p>Applicants are required to detail how they propose to work with, develop partnerships with, and communicate to parents/family/whānau and community to:</p> <ul style="list-style-type: none"> • promote high attendance; • strengthen support for learning; • encourage parent/family/whānau/community involvement in school operations; and • communicate the school's progress and achievements.
Q16-18	Community participation	<p>This criterion seeks to understand the proposed relationship that the school intends holding with community agencies and organisations that serve students who attend school and detail specific commitments to enrich the learning opportunities of the school's students.</p>
Q1-9-21	School organisation and culture	<p>Applicants are required to demonstrate they have well-considered principles regarding how the school will be organised and how this will support student learning, provide in sufficient detail the proposed school calendar covering daily hours of operation, timetable and the way the school day and year will be organised for instruction, assessment, and all other key school activities.</p>
Q22	Safe learning environment	<p>Applicants are required to provide an overview of the school's philosophy and methodologies regarding student behaviour, discipline and participation in school activities.</p>
Q23-24	PD for teachers, administrators and other school staff	<p>Applicants are required to detail proposed professional development for teachers, administrators and other school staff, and they will promote effective self review, demonstrating how this will enable the school to both meet the needs of priority students and</p>

RFA Section/Question	Section Name	Description
		support achievement of the educational outcomes.
7. Business Plan		
Q25-26	Governance, management and administration	This criterion seeks to establish that the proposed governance and management structures are appropriate for the size and type of school being proposed.
Q27	Planning and establishment	Applicants are required to provide a detailed implementation and establishment plan that demonstrates clear understanding of the actions and priorities required to establish a school.
Q28-30	Financial forecast	The financial section of the Application is embedded within the Business Plan. Applicants are required to: <ul style="list-style-type: none"> provide a detailed financial forecast of the initial term of the contract; detail how the Applicant will ensure the availability of funds throughout the year; financial management and accounting policies and controls to provide fiscal accountability; and detail any additional funding (to that provided by the Crown) describing what the funds will be used for and the relationship that will exist between the funder and the school.
Q31-32	Facilities	This criterion seeks to assess the proposed facilities and strategies for asset management and maintenance to ensure that the quality of the facilities is maintained.
8. Operations Plan		
Q33	Enrolment and school marketing	This section requires Applicants to describe their proposed enrolment targets and how the school will expand to meet these requirements and how the school and its program will: <ul style="list-style-type: none"> be publicised to the community; target parents/family/whānau who might not be engaged in their child's learning; and identify and develop key relationships with community organisations.
Q34	Timeline for registering and enrolling	This section seeks to understand the proposed enrolment policy and timeline for registering and enrolment of students for 2017, and that demonstrates the Applicant's experience in executing this particular set of actions.
Q35	P&P for withdrawal, suspension and expulsion of students	Applicants are required to detail the suspension, expulsion and other disciplinary policy and procedures of the proposed school, the criteria for taking such actions and how this aligns with legislation and Ministry guidelines.
Q36	Key Leadership Roles	Applicants are required to table the names and qualifications of persons that will hold key leadership roles (and provide CVs or job descriptions as an appendix), and detail the standards that will be used in recruiting

RFA Section/Question	Section Name	Description
		teachers and other staff, including the depth of experience and the personal qualities that will be sought.
Q37	Recruitment processes	Applicants must demonstrate a strong understanding of a high-quality approach to sourcing and recruiting teachers, administrators and other school staff.
Q38	Professional backgrounds and personal qualities of staff	This criterion requires Applicants to describe the types of people that they seek to employ as teachers and other staff reflecting how these will complement the vision and mission of the school.
Q39-40	Employment Policies	Applicants are required to detail policies relating to salaries, contracts, performance evaluation and other matters relating to staff, attaching policies as an appendix.
Q41	Performance management and appraisal	Applicants are required to describe how teaching practices will be assessed including staff assessment processes.
Q42	Volunteers and contractors	Applicants who propose to use volunteers and/or contractors must provide details on: <ul style="list-style-type: none"> the proposed roles; how they will be organised to accomplish the school's mission and goals; and how they will be identified, vetted and trained.
Q43	Health and Safety	This criterion seeks to have Applicants demonstrate their: <ul style="list-style-type: none"> understanding of the range of health and safety requirements applicable to the delivery of a incident free school environment, and capability to establish and apply these effectively.
Other Sections – not weighted		
Section 10. Acceptance of draft Agreement		Applicants are required to table any comments or proposed amendments in relation to the draft agreement released with the RFA. The legal work stream will undertake a review to consider the comments/amendments and provide legal advice to the Ministry as required.
Section 11. Assumptions, Risks and Caveats		Applicants are required to table all assumptions, risks and caveats (aka tags) made throughout the Application that will be considered by Authorisation Board members seeking to determine the extent to which an Applicant is committed to its purpose and goals.
Section 12 – Applicant declaration		Your acceptance is required for your application to be deemed compliant and to be accepted into the evaluation process.
Section 13 – Applicant Checklist		Not evaluated – provided strictly as a checklist to Applicants when submitting the application.
Shortlisted Applications – Shortlisted Applications will undergo the following additional assessment		

RFA Section/Question	Section Name	Description
Applicant Interviews		Shortlisted Applicants will be invited to an interview with Authorisation Board members. Some questions will be varied and relate specifically to aspects of the Applicant's submitted proposal.
Due Diligence		Applicants will undergo a financial health check, using a reputable agency (e.g. Dunn & Bradstreet) to ensure successful Applicants have a robust financial history. Reference checks will be completed for shortlisted Applicants and facilities proposed by shortlisted Applicants or current operations if relevant may be subject to site visit by Authorisation Board members and/or Ministry officials to validate the fit for purpose.

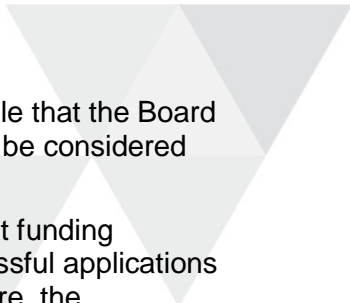
4.4 Evaluation scale

30. Each section will be evaluated using the following scale:

Rating	Definition
Excellent	Exceeds the requirement. Exceptional demonstration by the Applicant of the relevant ability, understanding, experience, skills, resources and quality measures required to deliver the outcomes. Application identifies factors that will offer potential added value, with supporting evidence.
Good	Satisfies the requirement with minor additional benefits. Above average demonstration by the Applicant of the relevant ability, understanding, experience, skills, resources and quality measures required to deliver the outcomes. Application identifies factors that will offer potential added value, with supporting evidence.
Acceptable	Satisfies the requirement. Demonstration by the Applicant of the relevant ability, understanding, experience, skills, resources, and quality measures required to deliver the outcomes with supporting evidence.
Minor Reservations	Satisfies the requirement with minor reservations. Some minor reservations of the Applicant's relevant ability, understanding, experience, skills, resources and quality measures required to deliver the outcomes, with little or no supporting evidence.
Serious Reservations	Satisfies the requirement with major reservations. Considerable reservations of the Applicant's relevant ability, understanding, experience, skills, resources and quality measures required to deliver the outcomes, with little or no supporting evidence.
Unacceptable	Does not meet the requirement. Does not comply and/or insufficient information provided to demonstrate that the Applicant has the ability, understanding, experience, skills, resources and quality measures required to deliver the outcomes, with little or no supporting evidence.

4.5 Contestable, competitive process

31. Although this RFA process is contestable and competitive, it differs from other more traditional procurement processes in that the Authorisation Board is not looking to necessarily recommend that only one Partnership School be



established as a result of this RFA process. Rather, it is possible that the Board might recommend to the Minister that a number of Applications be considered for contracts.

32. The competitive aspect of this process derives from the fact that funding available to establish Partnership Schools is limited, and successful applications will satisfy all of the criteria to an acceptable standard. Therefore, the Authorisation Board will be looking to recommend to the Minister only those Applications (if any) that meet the required high quality standards, and taking account of the amount of funding available for the particular round of Applications. Further, another competitive situation can arise if two or more Applications are received which propose establishing a Partnership School in broadly the same location (as this might impact upon whether the Board considers it is viable for two or more Partnership Schools to be established in close proximity).
33. Until Applications are received, the Board will not know how many Applications might be recommended to the Minister as this will depend on factors including the size of and location of the Partnership School(s) being proposed and the quality of the Applications received.

5 Notes to completing the Application

34. When responding to this RFA, Applicants are required to submit the following information as part of their Application:
 - a) completed Applicant contact details and school overview in the form set out in Part two – Application Form sections 1 to 3 of this RFA;
 - b) a section that responds to all of the questions under each of the requirements outlined in sections 4 to 9 of Part two of this RFA;
 - c) if the Applicant does not accept the Draft Agreement in its entirety, a completed table of proposed Draft Agreement derogations in the form set out in section 10 of this document RFA;
 - d) a completed table of assumptions, risks, and caveats in the form set out in section 11 of Part two of this RFA;
 - e) a completed compliance checklist in the form set out in section 13 of Part two of this RFA; and
 - f) a completed and signed Application Declaration in the form set out in section 12 of Part two of this RFA.
35. The information required must be presented in the following manner:
 - a) the information must be presented in a Word document format (.doc or.docx) and must be compatible with Microsoft Word 2010 (except financial/commercial information which is to be included in an Excel spreadsheet in .xls or .xlsx format, compatible with Microsoft Excel 2010);
 - b) assumptions relating to information contained in an Excel worksheet must be included in that same document;
 - c) all text is to be in Arial font (or equivalent) in font size 10;
 - d) questions under each of the requirements outlined in sections 3 to 9 of Part two of this RFA must be answered in the order they are provided in the RFA; and
 - e) each question under each of the requirements outlined in sections 3 to 9 of Part two of this RFA should be answered separately. Do not rely on information included in your Application to answer one question, being counted for the purpose of answering another question.
36. Limit your application to no more than 100 pages in total (excluding the exceptions noted on the Application Form).



6 Standard Terms

37. This RFA process is subject to the following Terms.

6.1 Basic requirements

6.1.1 Terms

38. This RFA, including all Schedules, sets out the terms upon which Applicants must submit Applications. These terms are non-negotiable.
39. Any suitably qualified and experienced Applicant may submit an Application in response to this RFA.
40. Each Applicant should carefully read this RFA to ensure that its Application complies with the terms. By submitting an Application the Applicant accepts that it is bound, without reservation or variation, by the terms set out in this RFA.
41. The Ministry is not required to accept any Application for evaluation that does not comply with these terms.

6.1.2 Indicative timeline

42. The indicative timeline for this RFA is stated in the RFA – Part One Section 2 (paragraph 3.6 - Our Timeline). Please note that these dates and times may be subject to change at the sole discretion of the Ministry. The Ministry will notify Applicants of any changes to these dates or times by notice posted on GETS or by contacting each Applicant directly.

6.1.3 Contact Person

43. All enquiries regarding this RFA must be directed to the Contact Person, whose details are provided in the RFA – Part One Section 2 (paragraph 3.4). The Ministry requests that email be used for all communications in relation to this RFA.
44. Only the Contact Person, and any person authorised by the Contact Person, are authorised to communicate with Applicants regarding any aspect of this RFA. Where an Applicant has an existing contract with the Ministry then business as usual communication, for the purpose of that contract, will continue using the usual contacts. Applicants must not use business as usual contacts to attempt to lobby the Ministry or the Board, solicit information or discuss any aspect of this RFA. The Ministry reserves the right to disqualify an Applicant from further participation in this RFA process if the Applicant acts in a way that is not in accordance with this paragraph 6.1.3.
45. The Ministry will not be bound by any written or oral statement made by any person, other than the nominated Contact Person.
46. The Ministry may change the Contact Person at any time. The Ministry will notify Applicants of any such change by posting a notice on GETS or by contacting each Applicant directly.

6.1.4 Applicants' obligations

47. Each Applicant will be considered to have:
- examined the RFA and any documents referenced in the RFA and any other information provided by the Ministry;

- b) considered all of the risks, contingencies and other circumstances relating to the operation of a Partnership School and therefore included adequate provision in its Application to manage such risks and contingencies; and
- c) obtained independent advice (including legal and accounting advice as required) before making a decision to submit an Application;
- d) satisfied itself as to the correctness and sufficiency of its Application;
- e) listed any assumptions made in putting forward its Application; and
- f) provided all referees/references requested by this RFA at the time it submits its Application.

6.1.5 Ethics

48. Applicants must not, in relation to any representative of the Board, Ministry or the Minister's Office, directly or indirectly:
- a) approach, contact, lobby or solicit information concerning any aspect of this RFA; or
 - b) attempt to influence, or provide any form of personal inducement, reward or benefit.
49. A representative of the Board, the Minister's Office or the Ministry includes any employee, consultant, contractor or advisor engaged by the Board, the Minister or the Ministry. Any Applicant, who attempts to do anything prohibited by the above clause, will be immediately disqualified from this RFA process.

6.1.6 Anti-collusion

50. In submitting an Application each Applicant is required to provide a warranty that its Application has not been prepared with consultation, communication, contract, arrangement or understanding with any other Applicant (unless for a collaborative joint venture, consortium or sub-contracting purposes).
51. Applicants must indicate if they intend any person or organisation, who is not an employee, to sub-contract or enter partnering arrangements to provide any of the services that relate to the operation of the Partnership School. The partner/sub-contractor's details including the services they are responsible for must be provided.
52. The Ministry reserves the right, at its discretion, to report suspected collusive or anti-competitive conduct by Applicants to the appropriate authority and to provide that authority with any relevant tender information.

6.1.7 Confidentiality

53. Subject to paragraph 54 of this clause 6.1.7 the Ministry, and each Applicant, will keep confidential all Confidential Information provided by the other. Other than as contemplated under paragraph 54 below of this clause 6.1.7, no Confidential Information will be provided to a third party without the other's prior written consent.
54. Where an Application contains information, such as intellectual property, that an Applicant considers should be held as confidential, the Applicant must clearly identify the information and mark it 'confidential' or 'commercially sensitive'. The Applicant may be asked by the Ministry to indicate the reason why such information should be held as confidential.
55. Applicants acknowledge that the Minister (and any other Minister of the Crown), the Ministry and the Board's obligations under the above clause are subject to

the requirements imposed by statute (e.g. Official Information Act 1982, the Privacy Act 1993) and parliamentary convention. The Ministry's obligation to keep the Applicant's information confidential will not be breached if the information is disclosed by the Ministry to the appropriate authority because of suspected collusive, or anti-competitive tendering behaviour.

7 Preparing an Application (Detailed)

7.1 Clarification Period

56. Each Applicant must satisfy itself as to the interpretation of the RFA, and should, where there is any perceived ambiguity or uncertainty in the RFA documents, seek clarification.
57. During the period from the date the RFA is issued to the deadline for Applicants' questions, stated in the RFA Part One – Section 2 - 3.6 (Clarification Period ends), Applicants may contact the Contact Person to request clarification of any matter regarding the RFA or to request additional information.
58. All such requests must be made by email to the nominated Contact Person whose details are provided in the RFA Part One - Section 2 (paragraph 3.4). When sending an email the Applicant should request a 'read receipt'. Please allow a reasonable period of time for the Ministry to respond to a request. Requests will be dealt with by the Ministry during standard Business Days and hours.
59. The Ministry is not required to respond to any request received after the Clarification Period, although it reserves the right to do so.
60. If the Ministry considers a request to be of sufficient importance to all Applicants, it may post a copy of the request (without identifying the Applicant) along with the answer on GETS or provide this to each Applicant directly. In deciding whether or not to publish the question and answer the Ministry will take into account the risk of disclosing information which may be commercially sensitive to an Applicant's business, such as Intellectual Property Rights. Otherwise, the Ministry may respond directly to individual Applicants where it considers it desirable to do so.

7.2 Completing the Application

61. Applications must follow the format set out in the relevant templates in Part Two of this RFA (as described in this document Section 2 paragraph 5). Applicants must provide all information requested in this RFA in their Proposal, and in the format specified in this RFA or in response to a request for clarification.
62. Failure to provide all information required by the Ministry could result in the Application being rejected as being non-conforming.
63. Please print Applications double-sided. Please minimise the use of non-recyclable or non-reusable materials, such as plastic report covers, plastic dividers, vinyl sleeves and binding materials. Two-ringed binders, glued materials, paper clips and staples are acceptable. Applications should be submitted in a format which allows for easy removal and recycling of materials.

7.3 Joint Applications

64. Applicants may submit joint Applications, so long as the requirements of this RFA are met. Any joint Application must clearly identify:
 - a) all of the parties who are submitting the joint Application;

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- b) the nature of the relationship between the parties for the purpose of the joint Application;
 - c) confirmation that all parties are committed to the relationship and the joint Application;
 - d) the specific parts of the service each party will be responsible for delivering;
 - e) which party, parties or other legal entity will ultimately be the Sponsor for the purpose of the agreement to be entered into with the Minister;
 - f) the structures set up by the parties that support good governance and accountability and financial and contract management; and
 - g) be signed by all parties.
65. In evaluating a joint Application the Ministry and the Board may take into account, in its evaluation, any complexity or risk presented by a joint Application.
66. A joint Application must be a genuine joint venture with the services to be performed for the operation of a Partnership School being provided on a joint and fully integrated basis.

7.4 Language and price

67. Applications must be in English and prices are to be quoted in New Zealand dollars exclusive of goods and services tax (GST).

7.5 Application costs

68. Each Applicant must meet all of its own costs associated with the preparation and presentation of its Application and any negotiations.

7.6 Offer validity period

69. Applications shall remain valid and open for acceptance for a period set out in the RFA – Section 2 (paragraph 3.8) as calculated from the Closing Date.

7.7 Reliance on the Application

70. Each Applicant must ensure that all information provided to the Ministry is complete and accurate. The Ministry is entitled to rely upon all information provided by an Applicant in its Application and in any correspondence or negotiations with the Minister, or the Minister's representatives.
71. If the Applicant discovers or is notified of any errors, omissions or inaccuracies in its Application, after the closing date, and the correction of such errors, omissions or inaccuracies would not result in a material change to the Application, the Applicant will notify the Ministry of any correction required. The Ministry is not required to take the correction into account when evaluating the Application, but may do so if it so chooses.

7.8 Ownership of documents

72. All documents forming the Application will, when delivered to the Ministry, become the property of the Ministry. Applications will not be returned to Applicants at the end of the process.
73. Ownership of Intellectual Property Rights does not pass on an Application being delivered to the Ministry. However, the Applicant grants to the Ministry a license

to retain, use, disclose and copy information contained in the Proposal for any purpose related to this Application process.

74. This RFA and any other documents supplied by the Ministry to the Applicants, remain the property of the Ministry. Each Applicant may only distribute this RFA to the extent necessary for the purposes of preparing its Application.

8 Submitting an Application

8.1 Submitting an Application

75. Applications must be presented and submitted to the Ministry in the manner set out in the RFA – Part two - Section 5.
76. Applications must be delivered to the Ministry by the deadline for Applications (Closing Date) stated in the RFA – Part two Section 4 (paragraph 3.6).
77. Once submitted, an Application is irrevocable for 180 days from the Closing Date, and may not be withdrawn or modified during that period except with the Ministry's written consent.
78. The Ministry accepts no responsibility for Applications delivered to the wrong address, or which, for whatever reason, are not received.
79. The Ministry will acknowledge receipt of each Application by email.
80. By submitting an Application each Applicant warrants that all information provided by it to the Ministry, is complete and accurate in all material respects. Each Applicant also warrants that the provision of that information, or its use by the Ministry, will not breach any third party Intellectual Property Rights.
81. Where the Ministry has requested the Application in hard copies and an electronic copy, and there is a difference between the hard copy and the electronic copies, the hard copy will prevail.

8.2 No binding legal relations

82. Applications are submitted on the basis that no binding legal relations with the Minister or the Ministry are created unless, and until, a written contract between the Minister of Education and the Successful Applicant(s) is signed by both parties.

8.3 Late Applications

83. The Ministry does not intend to accept any Application that it receives after the Closing Date, other than in exceptional circumstances.
84. In particular, the Ministry will not accept a late Application if it considers that:
 - a) there is any risk of collusion on the part of an Applicant or Applicants;
 - b) the Applicant may have knowledge of the content of any other Application; and/or
 - c) it would be unfair to any other Applicant (who has met all of the RFA terms) to accept the late Application.
85. The Ministry reserves the right to accept any late Application, where it considers that there is no material prejudice to other Applicants.

9 Evaluation of Applications



9.1 Evaluation

86. The Ministry and the Board comprise members chosen for their relevant expertise and experience and make up the evaluation team. Applicants must not communicate with any member of the evaluation team.
87. The Ministry and the Board will evaluate each Application in accordance with the methodology set out in Evaluation of Applications (Section two - paragraph 4).
88. The Ministry and the Board may undertake due diligence relating to any Application at any time during the evaluation process. The Ministry and the Board may, at its sole discretion, invite independent advisors to evaluate any Application, or any aspect of any Application.
89. Applicants should note that, while the Ministry and the Board may conduct interviews, site visits and reference checks, it intends to base its evaluation primarily on the written Application submitted in response to this RFA. Applicants are therefore encouraged to submit their best and unconditional Applications in the first instance.

9.2 Clarification

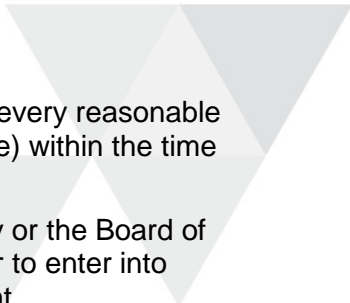
90. The Ministry may request clarification and additional information from any Applicant about any aspect of an Application. The Ministry is not required to request the same clarification or information from each Applicant.
91. The Applicant must provide the clarification or additional information in writing and within the reasonable time notified by the Ministry. The evaluation team may take such clarification or additional information into account in evaluating the Application.
92. If an Applicant fails to respond adequately or in a timely manner to any request for clarification or additional information, the Ministry and the Board may cease evaluating the Application without further notifying the Applicant.

9.3 Collection of further information

93. Each Applicant authorises the Ministry to collect any information (except commercially sensitive pricing information) from any relevant third parties (such as a referee or previous or existing client) and to use that information as part of its evaluation of the Application.
94. Each Applicant must ensure that all referees provided in support of its Application agree to provide a reference and are appropriately briefed on the Application. To facilitate discussions between the Ministry and the Board and referees, each Applicant waives any confidentiality obligations that would otherwise apply to information held by any referee, with the exception of commercially sensitive pricing information.

9.4 Shortlisted Applicant(s) Interviews

95. Following the initial evaluation process, the evaluation team may select one (or more) short-listed Applicants. The shortlisted Applicant will be notified and advised of the process and timeline for interviews.

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96. Interviews will be held at a location to be determined (however every reasonable attempt to convene at a location near the Applicant will be made) within the time periods noted in Section 2 Paragraph 3 of this RFA.
 97. Such notification does not constitute acceptance by the Ministry or the Board of the Application, or imply or create any obligation on the Minister to enter into negotiations with, or award a contract to any Preferred Applicant.
 98. Each Applicant that is not a shortlisted Applicant will be notified that:
 - a) its Application has not been shortlisted; or
 - b) its Application is currently not shortlisted but may be so if Applications that have been shortlisted turn out to be unsuitable.

9.5 Recommended Applicant(s)

99. Following the evaluation process and shortlisted Applicant presentations, the evaluation team may select one (or more) Recommended Applicants.
100. The Recommended Applicants will be provided to the Minister, to be considered for Preferred Applicant status.

9.6 Preferred Applicant(s)

101. Preferred Applicants are those which have been approved by the Minister to enter into negotiations.
102. Approval by the Minister does not constitute acceptance by the Ministry, Board or the Minister of the Application, or imply or create any obligation on the Minister to award any contract to a Preferred Applicant.
103. Each Application that is not a Preferred Applicant will be notified that:
 - a) its Application has been unsuccessful, or
 - b) its Application is currently not preferred but may be so if an Application that is preferred turns out to be unsuitable.

9.7 Negotiations

104. The selection of the Successful Applicant(s) will be influenced by the willingness of the Preferred Applicant(s) to negotiate any outstanding issues in a responsive and co-operative manner.
105. The Minister may discontinue negotiations with any Preferred Applicant at any time, for any reason and may select additional Preferred Applicant(s) at any time.

9.8 Successful Applicant(s)

106. On successfully completing negotiations and upon the Minister's agreement the Ministry will inform all other Applicants of the outcome and the name(s) of the Successful Applicant(s), if any.

9.9 Applicant debrief

107. Following the award of the Contract, the Board and the Ministry will provide a debrief by letter, email, phone or face to face meeting. The debrief will aim to:
 - a) provide the reasons why an Application was not successful;

- b) explain how the Application performed against the evaluation criteria;
- c) indicate the relative advantages/strengths of the successful Application(s); and
- d) answer any concerns or questions from the Applicant other than questions or concerns that relate to the content of another Applicant's Application.

10 General terms

10.1 Form of contract

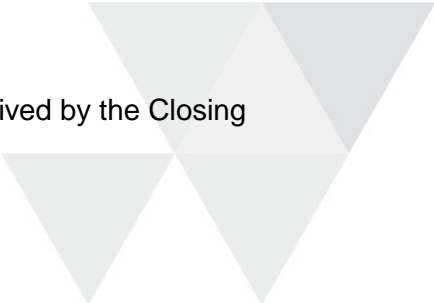
- 108. Each Applicant agrees that any legally binding contract entered into between the successful Applicant and the Minister will be essentially based on the Draft Agreement provided as an attachment to this RFA.
- 109. An Applicant's acceptance, or otherwise, of the contractual terms and conditions set out in the attached Draft Agreement of this RFA is one of the criteria that the Ministry and the Board will take into account when evaluating Applications.
- 110. The Minister reserves the right to amend the Draft Agreement following negotiations with the successful Applicant.

10.2 Status of RFA / Application

- 111. Neither the RFA, any Application, nor the RFA process shall create any legal relationship between the Board, the Minister and/or Ministry and an Applicant. This RFA process does not give rise to a process contract.
- 112. No contract shall arise between the Minister and an Applicant until a formal written contract is signed by the Minister and the successful Applicant.
- 113. If there is any conflict, or inconsistency between the terms set out in this RFA and the terms contained in an Applicant's Application, the terms and conditions set out in this RFA shall prevail.

10.3 Ministry and Board's rights

- 114. In addition to any other term described in this RFA, the Ministry and/or the Board reserves the unrestricted rights, at any time, to:
 - a) not consider any Application;
 - b) amend, suspend or cancel this RFA process, or any part of this RFA process;
 - c) change any date in this RFA process on the proviso that any material change is notified to Applicants by a notice published on GETS or directly to each Applicant;
 - d) delete, change or add to any requirement contained in the Requirements (RFA Part One – Section 1 - Paragraphs 3 to 5) prior to the Closing Date on the proviso that any material change is notified to Applicants by a notice published on GETS or directly to each Applicant;
 - e) reject or accept any non-compliant Application;
 - f) reject or accept any alternative Application;
 - g) reject or not consider any further information that the Applicant may provide that is received subsequent to the lodging of an Application;

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- h) accept any Application for evaluation that is not received by the Closing Date;
 - i) seek clarification of any Application;
 - j) re-invite Applications;
 - k) re-issue the RFA;
 - l) take into account any relevant information that the Ministry may have in its possession and make enquiries of any person in order to assist in the evaluation process;
 - m) recommend to the Minister that the Minister should not enter into any contract with any Applicant, or should enter into one or more contracts with any Applicant or Applicants;
 - n) exclude any Applicant from this RFA process where the Applicant has breached a term of this RFA;
 - o) give whatever weight it considers appropriate to any policy or criteria relating to the participation in this RFA process or the evaluation of any Application;
 - p) liaise or negotiate with any Applicant without disclosing this to, or doing the same with, any other Applicant;
 - q) provide or withhold from any Applicant information in relation to any question arising in relation to this RFA process. Information will only be withheld if it is deemed unnecessary, is commercially sensitive to an Applicant, or is inappropriate to supply at the time of the request;
 - r) deal separately with any divisible element/s of the Requirements, or any Application, unless the Application specifically states that those elements must be taken collectively; and
 - s) otherwise run this RFA process as it sees fit.

10.4 Conflict of Interest

115. Each Applicant must include a Conflict of Interest Declaration with its Application. Each Applicant must immediately inform the Ministry should a Conflict of Interest arise during the RFA process.

10.5 Public statements

116. Applicants must not issue any public statement in relation to this RFA, or any subsequent contract awarded, without the prior written approval of the Ministry or its nominated representative.

10.6 New Zealand law

117. The laws of New Zealand shall govern this RFA and each Applicant agrees to submit to the exclusive jurisdiction of the New Zealand courts in respect of any dispute concerning this RFA, their Application or the RFA process.

10.7 Disclaimer

118. Whilst all reasonable care has been taken in compiling this RFA, the information and details are presented in good faith, no warranty (expressed or implied) is given by the Ministry as to the completeness or accuracy of the documents or information contained herein.

10.8 Involvement of Ministry officials

119. The Ministry and the Board reserves the right to seek and receive administrative support and advice from the Ministry officials (or officials in any other government department as required) in order to assist the Ministry and the Board to undertake any of its functions under this RFA.

Appendix I - Legislative comparison of different schooling types

The following table sets out in summary the legislative differences between the different types of schools recognised under the Education Act.

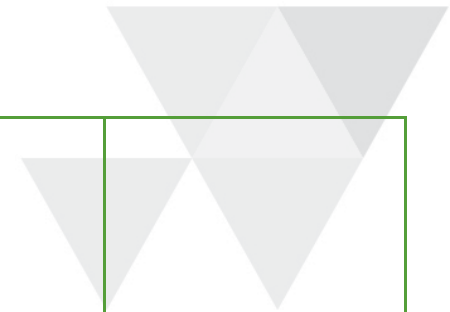
Factor	Partnership School	State School	Section 155 – Kura Kaupapa Māori	Section 156	State-integrated	Private
<i>Legal status</i>	Fixed term contract	Crown entity	As per state school	As per state school	As per state school	Private business
<i>Character</i>	Any special character will be defined by the Sponsor and set out in the school's mission statement	Secular	Secular. Must adhere to Te Aho Matua (a teaching and learning philosophy). Te Reo Māori is the principal language of instruction. Can have other special characteristics. Name of the school must begin with the words 'Te Kura Kaupapa Maori o'	Secular. Must provide education of a designated character that differs significantly from that of an ordinary state school, and is not available at any other reasonably convenient state school.	Must provide education with a special character within the framework of a religious or philosophical belief.	Can have any type of character.
<i>Guardian of character</i>	Sponsor	State	Te Runanga Nui o Te Aho Matua has the right to define Te Aho Matua; approve any English translation; and be consulted about ability of a school to operate in accordance with Te Aho Matua	State	Proprietor	School managers
<i>Governance</i>	Governance model determined by Sponsors	Board of trustees elected by parents and staff every three years. Usually comprise five parents, the principal, a staff member, and a student representative in secondary schools.	As per state school	As per state school	As per state school	Governance model determined by school managers
<i>Opening, merging and</i>	A specially convened Authorisation Board	Minister decides to open (with Cabinet	Parents of at least 21 prospective students must	Parents of at least 21 prospective students	Proprietor of an existing private school applies for	Any fit and proper candidate can apply. If

<i>closing</i>	<p>undertakes a rigorous due diligence on proposals. The Minister of Education makes the final decision to approve or decline proposals.</p> <p>Partnership Schools have a fixed term contract with the Crown. The contract clearly defines outcomes that the Sponsor will be held to account for achieving. The contract can be renewed or revoked depending on the performance of the Sponsor.</p>	<p>approval), merge and close schools.</p> <p>Decisions usually based on network management need – e.g. increasing or declining rolls in an area. Boards can ask for a voluntary closure or merger, or Minister can direct them to close or merge.</p>	<p>apply. Minister has absolute discretion to open to manage fiscal risk.</p> <p>Te Runanga Nui o Te Aho Matua consulted over closure, but Minister makes final decision. Some restrictions on merger.</p>	<p>must apply.</p> <p>Minister has absolute discretion to open to manage fiscal risk. Minister makes decision about closure. Some restrictions on merger.</p>	<p>integration. If Minister approves application, an integration agreement is signed and sealed by the proprietor and the Minister. Network impacts taken into account. Integration agreement can be cancelled by the mutual agreement of the Minister and the proprietor.</p> <p>It is not legally possible for state integrated schools to merge. If a board wants to bring two or more integrated schools together, the proprietor should be consulted.</p>	<p>school meets the private school standards, it can be registered. These include: a roll of 9 or more students; suitable premises, staffing and equipment; a curriculum for teaching, learning and assessment; and tuition of a standard no lower than at state schools.</p> <p>Fiscal risk is managed by having a capped pool of funding for private schools so any new school reduces the funding for all schools. Have to inform Secretary for Education if close.</p>
<i>Accountability</i>	<p>Partnership Schools have a fixed term contract with the Crown. The contract has specified minimum requirements that must be met and clearly defined outcomes that the Sponsor is held to account for achieving. The contract can be renewed or revoked depending on the performance of the Sponsor.</p>	<p>Government sets expectations through the NAGs and NEGs. Boards implement these through a prescribed planning and reporting cycle. Must report annually to Ministry and community on education outcomes and finance.</p> <p>Audited by Auditor-General, and reviewed regularly by ERO.</p>	As per state school	As per state school	As per state school	<p>Not required to implement the NAGs and NEGs. Required to report to Secretary annually against their Government subsidy on audited transactions only. Reviewed regularly by ERO as to 'efficiency' as defined in section 35A of Education Act.</p>
<i>Interventions</i>	<p>The Secretary of Education has the power of intervention in a Partnership School if</p>	<p>Education Act allows a number of statutory interventions for failing boards, including</p>	As per state school	As per state school	As per state school. Must consult with proprietor before appointing limited statutory manager or	Secretary can deregister or suspend registration if not meeting the

	they have reasonable grounds to believe that there is an emergency, affecting the education or welfare of the students. In such case, the Secretary may take over the management of the school for as long as they consider it necessary.	appointing limited statutory manager or commissioner			commissioner.	standards.
<i>Funding</i>	Partnership Schools will be fully funded schools outside the state system. The funding is non-tagged to allow sponsors more decision making flexibility.	Receive operational grant funding from the Ministry based on student numbers, student year levels, decile, and location. Board controls school finances.	As per state school	As per state school	As per state school	Responsible for own finances. Receive a per-student subsidy from the Government. No adjustments are made for decile or location.
<i>Fees</i>	As in state schools education is free. All payments are voluntary except for charges for voluntary purchases of goods and services. Parents can be asked for donations.	Education is free, but board can require payment for items retained by the student. Parents can be asked for donations.	As per state school	As per state school	Education is free, but board can require payment for items retained by the student. Proprietor can require payment of attendance dues approved by the Ministry for capital costs.	Parents charged fees
<i>Property</i>	Partnership Schools are responsible for their school property and buildings. These must comply with all building legislation.	Ministry purchases school property and provides buildings. Board develops five-year plans to manage property.	As per state school	As per state school	Proprietor provides and maintains school property and buildings at state school standards	Responsible for own school property and buildings. Must comply with all building legislation. Do not need to comply with state school standards.
<i>School management and administration</i>	Sponsors will set their own policies for managing the school.	Set their own policies for managing the school, but must include National Education Guidelines.	As per state school	As per state school	As per state school	Set their own policies

		Includes uniform, fundraising etc				
<i>Suspensions, expulsions, exclusions and stand-downs</i>	Set out in the Partnership Schools contract and linked back to the Education Act. The school can set own policies.	Education Act sets out reasons and processes for these, but schools set own policies (e.g. zero tolerance or restorative justice). Ministry has to place excluded student at another school, and can direct enrolment to another state school (not state-integrated)	As per state school	As per state school	As per state school	These are part of the contractual arrangement with parents. State's only involvement is to be told of expulsions so another school can be found.
<i>Term dates and holidays</i>	Set own term dates and holidays	Set by the Minister of Education – can be varied on a case by case basis	As per state school	As per state school	As per state school	Set own term dates and holidays – though may not meet registration standards if excessively long or short
<i>Length of school day</i>	Set own length of school day	Required to be open for certain number of half-days each year. Defined as at least two hours in the morning, and at least two hours after noon.	As per state school	As per state school	As per state school	Set own length of school day
<i>Enrolment</i>	Must accept all students who apply for entry and agree to adhere to the special character of the school, regardless of background or academic ability. If oversubscribed, they will conduct a ballot for available places.	Must accept all students who apply who are within the year levels of the school, unless single-sex or there is an enrolment scheme in place	Parents have to accept Te Aho Matua. Has a maximum roll set by the Secretary, and can have an enrolment scheme.	Parents have to accept the special character. Has a maximum roll set by the Secretary, and can have an enrolment scheme.	Has a maximum roll divided into preference and non-preference students. Policy and practice allows proprietor to determine who is a preference student. Can refuse an enrolment if a student would jeopardise the special character.	Free to accept or reject applicants provided human rights legislation is not broken

<i>Curriculum</i>	A Partnership School can choose to use the NZ Curriculum or Te Marautanga o Aotearoa, or an alternative curriculum that can be mapped to the vision, principles, values and key competencies in these documents.	Must use the New Zealand Curriculum or Te Marautanga o Aotearoa. Schools have flexibility to design their own curriculum that responds to the needs of their students and local community.	As per state school	As per state school	As per state school	Can choose own curriculum, but must make details about it and its programme for delivery available to parents
<i>Qualifications and assessment</i>	Partnership Schools can choose the qualifications and assessment framework they wish to offer, but they must demonstrate that they are recognised in NZ, provide pathways and future options, have equivalency with NCEA Level 2.	Must offer access to NCEA, but can choose to offer other internationally recognised qualifications as well. Must report against National Standards or Ngā Whanaketanga Rumaki Māori for students in Years 1-8.	As per state school	As per state school	As per state school	Can choose the qualifications and assessment framework on offer. Not required to report against National Standards or Ngā Whanaketanga Rumaki Māori.
<i>Staff employment</i>	Governing body employs all staff	Board employs all staff, including principal	As per state school	As per state school	As per state school	Governing body employs all staff
<i>Teacher holding a Practising Certificate</i>	The percentage of teachers not holding a Practising Certificate employed at the school is negotiated as part of the contracting process	All teachers must hold a Practising Certificate	As per state school	As per state school	As per state school	As per state school
<i>Police vetting</i>	Partnership Schools follow the same requirements as state and private schools. Every person who is appointed to a position at a Partnership School, who does not	Teachers required to be vetted through Practising Certificate process. Other staff and adults who have regular contact with students are also required to be vetted.	As per state school	As per state school	As per state school	As per state school



	<p>hold a Practising Certificate or holder of a LAT and who works at the school during normal school hours or service opening hours must be police vetted.</p> <p>Other staff and adults who have regular contact with students are also required to be vetted.</p>					
<i>Teacher salaries</i>	Set own staffing and salary levels.	<p>Ministry sets teacher staffing levels, and centrally-funds teacher salaries. Salary levels set through industrial bargaining regime.</p> <p>Schools can employ other staff and extra teachers using operation grant funding.</p>	As per state school	As per state school	As per state school	Set own staffing levels and salary levels

Appendix II – Performance Standards

120. The tables in this appendix set out the performance standards that are intended to apply to the agreement with successful applicants (if any).

Notes:

- There are currently no performance standards listed for Partnership Schools that intend to provide schooling for years 0-8 (or a variant of this). It is expected that specific performance standards covering this type of schooling option will be developed, if required, prior to finalising any agreement for this provision.
- **IMPORTANT - All Sponsors will be expected to gather baseline data, conduct quarterly testing and report on student progress across all classes.**

10.8.1 Part A – Primary School Performance Standards

Outcome	Indicator	Metric	Performance Standard					
			2017				2018	2019
Excellent student achievement	Achieving at or above for National Standards at the end of the year	National Standards results	Year	Reading	Maths	Writing	To be confirmed	to be confirmed
			1	85%	85%	85%		
			2	85%	85%	85%		
			3	85%	85%	85%		
			4	85%	85%	85%		
			5	85%	85%	85%		
			6	85%	85%	85%		
			7	85%	85%	85%		
	8	85%	85%	85%				
	Growth/ value-added	National Standards results	Gather baseline information to set targets					
Strong student engagement	Unjustified absences	Measured at the end of each term through data provided to MOE	0.004 multiplied by the number of students multiplied by the number of days the school is open			0.002 multiplied by the number of students multiplied by the number of days the school is open	TBC	

	Stand downs	Schools legally required to notify MOE when these occur	0	0	0
	Suspensions	Schools legally required to notify MOE when these occur	0	0	0
	Exclusions	Schools legally required to notify MOE when these occur	0	0	0
	School culture	<i>wellbeing @school</i> annual student survey	Gather baseline information to set targets		
Financially healthy	Operating surplus	Notified to the MOE at the end of each term	2% -5%	2% -5%	2% -5%
	Working capital ratio	Notified to the MOE at the end of each term	2:1	2:1	2:1
	Debt/equity ratio	Notified to the MOE at the end of each term	0.5:1	0.5:1	0.5:1
	Operating Cash	Notified to the MOE at the end of each term	Positive cash flow forecast=actual	Positive cash flow forecast=actual	Positive cash flow forecast=actual
	Enrolment variance	Notified to the MOE at the end of each term	Establishment roll	Establishment roll	Maximum roll for some schools
Targeting priority learners	Enrolment of priority groups	Number of learners who are Māori, Pasifika, students with special education needs or from low socio-economic backgrounds	75%	75%	75%
Mission-specific goal		To be negotiated			

10.8.2 Part B – Secondary School Performance Standards

Outcome	Indicator	Metric	Performance Standard		
			2017	2018	2019
Excellent student achievement	NCEA Level 1	School leavers with NCEA level1	90%	To be advised	To be advised
	NCEA Level 2	School leavers with NCEA level 2	85%	To be advised	To be advised

	Student progress years 9 and 10	Results from agreed tool(s) and OTJ	Gather baseline information to set targets		
	Student progress NCEA Level 1	Increase in student progress as shown by NCEA results	Gather baseline information to set targets		
	Student progress NCEA Level 2	Increase in student progress as shown by NCEA results	Gather baseline information to set targets		
	Student progress NCEA Level 3	Increase in student progress as shown by NCEA results	0.017 multiplied by the number of students multiplied by the number of days the school is open.	0.013 multiplied by the number of students multiplied by the number of days the school is open.	TBC
Strong student engagement	Unjustified absences	Measured at the end of each term through data provided to MOE	1.1 days per year per 100 students	0.9 days per year per 100 students	TBC
	Stand downs	Schools legally required to notify MOE when these occur	0.24 days per year per 100 students	0.18 days per year per 100 students	TBC
	Suspensions	Schools legally required to notify MOE when these occur	0.04 days per year per 100 students	0 days per year per 100 students	TBC
	Exclusions	Schools legally required to notify MOE when these occur	0	0	0
	Expulsions	Schools legally required to notify MOE when these occur	Gather baseline information to set targets		
	School culture	wellbeing@school annual student survey	2% -5%	2% -5%	2% -5%
Financially healthy	Operating surplus	Notified to the MOE at the end of each term	2:1	2:1	2:1
	Working capital ratio	Notified to the MOE at the end of each term	0.5:1	0.5:1	0.5:1
	Debt/equity ratio	Notified to the MOE at the end of each term			
	Cash flows	Notified to the MOE at the end of each term	Positive cash flow forecast=actual	Positive cash flow forecast=actual	Positive cash flow forecast=actual

	Enrolment variance	Notified to the MOE at the end of each term	Establishment roll	Establishment roll	Maximum roll for some schools
Targeting priority learners	Enrolment of priority groups	Number of learners who are Māori, Pasifika, students with special education needs or from low socio-economic backgrounds	75%	75%	75%
Mission-specific goals		To be negotiated			