



Request for Application to operate a Partnership School | Kura Hourua opening in 2018

Part Two – Application Form

Close Date - 8 November 2016 12 noon

**Applicant: [Insert name of Applicant Organisation
here]**

**School Name: [Proposed name of school here (if
applicable)]**

Contents

1	Applicant Contact Details	4
1.1	Contact person for this application.....	4
1.2	Sponsor organisation	4
2	Applicant Profile	6
2.1	Profile of applicant organisation	6
2.2	Proposed subcontractors	7
2.3	Financial information	8
2.4	Referees.....	8
2.5	Current and recent government contracts	10
2.6	Probity Requirements.....	10
3	School Overview.....	11
3.1	School roll.....	12
4	The Sponsor.....	13
5	Purpose and Goals	14
5.1	Distinctive mission, vision and special character	14
5.2	Accelerating the achievement of priority learners	14
5.3	Evidence of demand and sustained enrolment.....	16
6	Educational Plan.....	17
6.1	Student Achievement Goals.....	17
6.2	School Schedule	17
6.3	Qualifications or achievement standards offered.....	17
6.4	Curriculum	17
6.5	Assessment and achievement	19
6.6	Student behaviour management and safety	19
6.7	Transitional arrangements for students leaving this school	20
7	School Leadership and Teacher Quality	21
7.1	Organisational structure	21
7.2	Governance and management.....	21
7.3	Recruitment and retention of resources.....	22
7.4	Professional development.....	22

8	Community Outreach and Engagement	24
9	Premises	25
10	Implementation Plan	26
10.1	Strategic partnerships including alternative sources for funding and resources	26
10.2	Detailed implementation plans	26
10.3	Financial models and forecasts.....	27
11	Acceptance of Draft Agreement	28
12	Assumptions, Risks and Caveats	29
13	Applicant Declaration	30

1 Applicant Contact Details

1.1 Contact person for this application

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

1.2 Sponsor organisation

Complete the following table detailing the organisation that will, if successful, be named as the Sponsor of the school.

Full legal name of Sponsor:	
Trading name: (if different)	<i>if applicable</i>
Name of parent organisation:	<i>if applicable</i>
Physical address:	<i>if company insert registered office address</i>
Postal address:	
Website:	<i>if applicable</i>
Location of head office:	<i>City in New Zealand</i>
Type of entity (legal status):	<i>Limited liability company / trust / consortium / other please specify</i>
Registered Charity	<i>Yes / No – delete non applicable, if not a trust then enter N/A</i>
Charity (or) Company registration #:	<i>Provide the registration number for the trust or company as appropriate.</i>

Applicant: [Insert name of Applicant Organisation here]
School Name: [Proposed name of school here (if applicable)]

Country of residence:	NZ	Other _____
-----------------------	----	-------------

2 Applicant Profile

2.1 Profile of applicant organisation

As we are looking for this application to be self-contained, we request you include the following information from your Expression of Interest document.
If the applicant is a joint venture or a consortium, then copy and paste the table for each applicant.

a	Name of organisation	
b	Type of organisation	<i>Limited liability company / trust / consortium / other</i>
c	Charity or Company registration no. (if applicable)	
d	Name of parent organisation (if applicable)	
e	Year established	
f	List your key current activities	1. 2. 3. 4. 5.
g	List key personnel relevant to this application who will be involved in the establishment and/or ongoing operation of the school	
h	List your significant experience relevant to your application to operate a partnership school	
j	Total no. of staff in NZ	
k	Do you intend to establish a new legal entity to run the school?	<i>Provide details</i>

2.2 Proposed subcontractors

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

Copy and add more tables as required

Will the Sponsor sub-contract any part of the operation of the proposed partnership school to other parties?	
Response: Yes / No (delete as applicable) (If yes, please provide details below)	
Sub-contractor #1	
Sub-contractor name:	
Address:	
Specialisation:	
Describe the deliverables the sub-contractor will be responsible for:	

Sub-contractor #2	
Sub-contractor name:	
Address:	
Specialisation:	
Describe the deliverables the sub-contractor will be responsible for:	

2.3 Financial information

If the applicant is a joint venture or a consortium, then copy and paste the table for each applicant.

Current financial status:	brief description of the organisation's current financial status & stability			
Gross revenue:	state the gross revenue for the last two years			
Net profit (surplus) and Net Assets:	state the net profit (or surplus) for the last two years and the total value of net assets as at the closing date of the last financial period.			
Last audited financial accounts:	insert date of last audited financial accounts			
Copy of latest audited accounts attached?	Yes		No	
Copy of latest annual report attached?	Yes		No	
Is organisation in dispute with any trade union?	Yes		No	

2.4 Referees

Please supply the details of three referees. Referees provided should be able to attest to your organisation's capability in the areas of education, business and community engagement. Please do not provide employees of the Ministry of Education as referees.

Referee #1	
Name of organisation:	
Name of referee:	
Telephone:	
Email:	

Relationship:	<i>Summarise the nature of the relationship with this referee</i>
When:	<i>State the dates that this relationship covers</i>

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

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

2.5 Current and recent government contracts

Please provide a list of all government contracts your organisation (including current) holds or has held within the last 12 months. If the applicant is a joint venture or a consortium, then copy and paste the table for each applicant. Add more rows onto the bottom of table if needed;

Government Agency Name	Contract Title	Government Contract Manager Name address and one number	Total \$- value of Contract	Contract Term (eg start and end date)

2.6 Probity Requirements

We are seeking full disclosure in relation to any person or organisation that will have a ownership, management or operational function within in the proposed Partnership Schools. This includes the Sponsor Organisation and its shareholders or trustees, key staff, and subcontractors. In relation to this you must declare any pending claims or cases, or could judgements or decision within the last 6 years.

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

3 School Overview

a	Year groups the proposed school will serve		
b	Proposed location	<i>Address</i> <i>Suburb</i> <i>City</i>	
c	Priority student groups targeted (Enter percentage(s))	<i>Māori</i>	
		<i>Pasifika</i>	
		<i>Low socio economic</i>	
		<i>Special needs</i>	
d	Expected opening roll		
e	Proposed maximum roll		
f	Summarise the special character of your partnership school in one concise descriptive sentence		

3.1 School roll

If you propose to operate the school at more than one location, you must provide a table for each of the proposed locations and a summary table showing the total combined roll for the school. Please ensure that you have fully explained and justified your decisions around the proposed size of the school roll and the school's location in the body of your application.

Note

1. A copy of this table is provided in the MS Excel workbook, with formulae that will calculate the % change and total each of the columns. Applicants may use this version and simply copy and paste the details from that table as a replacement for the table below.
2. Delete the rows for the year levels that do not apply to the proposed school.

Year	2018 Roll	2019	% Change	2020	% Change	2020	% Change	2021 Roll	% Change
1									
2									
3									
4									
5									
6									
7									
8									
9									
10									
11									
12									
13+									
Other [list]									
Total									

4 The Sponsor

If the applicant is a joint venture or a consortium, then copy and paste the tables 4.1 to 4.3 below for each applicant.

Name of Applicant	TYPE NAME HERE
4.1 Provide an overview of the applicant organisation (who is or will form the Sponsor). Include an overview of their current business activities, and number of years that it has been operating.	
Response:	

4.2 Outline the track record of the applicant organisation to run the school.	
Response:	

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

5 Purpose and Goals

5.1 Distinctive mission, vision and special character

5.1.1 Expand on the distinctive concept behind the proposed school and what it will seek to deliver from section 2.2a in your EOI Response. Include a description of what sets your school apart from existing education provision.

Response:

5.1.2 What are the objectives for the School?

Note: These objectives must be suitable to be included in schedule 6, section 1 of the draft Agreement.

Response:

5.2 Accelerating the achievement of priority learners

5.2.1 Recap on the priority student groups targeted (from 2.1 of your EOI response).

Priority student groups targeted (Enter percentage(s))	Māori	
	Pasifika	
	Low socio economic	
	Special needs	

5.2.2 Describe how your proposed partnership school will improve the engagement and achievement of your target groups?

You should include:

- a) current educational outcomes and attainment levels of your proposed target groups
- b) the extent of improved performance you anticipate that your partnership school will achieve
- c) a detailed description of the well-grounded programmes, strategies and instructional practices your partnership school will use to bridge the gap between current attainment levels and the improved attainment you describe
- d) provide evidence, research and data analysis to support your response
- e) include links to and/or electronic copies of all sources of evidence, research, data and analysis that support your response.

Response:

5.2.3 Describe how you will ensure the specific needs of priority learner groups such as Māori, Pasifika and/or those with special education needs are met by your school.

Note:

Māori students: If you plan to target Māori students, outline your plans for *achieving success for Māori in education, so that students are enjoying and achieving success as Māori* <http://www.education.govt.nz/ministry-of-education/overall-strategies-and-policies/the-maori-education-strategy-ka-hikitia-accelerating-success> and *supporting Māori language in education: delivering strong, co-ordinated effort and investment* <http://www.education.govt.nz/ministry-of-education/overall-strategies-and-policies/tau-mai-te-reo-the-maori-language-in-education-strategy-2013-2017>

Pasifika students: If you plan to target Pasifika students, outline your *plans for achieving Pasifika success using students' identities, languages and cultures as foundations to build upon* <http://www.education.govt.nz/ministry-of-education/overall-strategies-and-policies/pasifika-education-plan-2013-2017>

Special education needs: If you are targeting students with special needs, outline how you will ensure you provide an inclusive environment for students with special education needs, including how the school will demonstrate inclusive practices; how the school will build its capability to address the needs of students with special education needs; and how partnerships with parents of students with special education needs are used to achieve education success.

Response:

--

5.3 Evidence of demand and sustained enrolment

5.3.1 Building on the information provided within your EOI response, provide demographic or other information that demonstrates the need for a new school and/or new school places in your proposed location.

Response:

5.3.2 If the school was to be established, demonstrate that it would achieve and sustain the level of enrolments anticipated in by section 3.1 School Roll.

Copy into this section letters of intent or support from parents or parent groups, or other evidence to support your enrolment numbers.

Response:

5.3.3 Describe your proposed timeline for enrolling students for the 2018 school year.

Response:

6 Educational Plan

6.1 Student achievement goals

6.1.1 Restate the student achievement goals of your partnership school (this should link to question 5.2.2 above).

Response:

6.2 School Schedule

6.2.1 Explain and provide evidence to support your proposed school calendar setting out:

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

Response:

6.3 Qualifications or achievement standards offered

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

Response:

6.4 Curriculum

6.4.1 Describe the curriculum to be used.

If you are not using The New Zealand Curriculum or Te Marautanga o Aotearoa, please:

- a) explain and provide evidence to support why you have chosen an alternative curriculum; and
- b) outline how your alternative curriculum aligns with The New Zealand Curriculum or Te Marautanga o Aotearoa.

If you are using the New Zealand Curriculum or Te Marautanga o Aotearoa, please explain why this is the best choice for your students.

Response:

--

6.4.2 Delivering the special character or distinctive concept

If the proposed curriculum includes a specific focus or method of delivery, provide detailed information on how this focus will be woven into the curriculum.

You should include specific, evidence-based reasons to support your response.

Response:

--

6.4.3 Curriculum development (if applicable)

If you plan to develop your own curriculum, explain how and in what timeframe this will be achieved.

Include details of the person or organisation who will be developing the curriculum and their skills and qualifications to do so.

Response:

--

6.4.4 Breadth of curriculum

If you are offering a senior secondary school, indicate the subject range at each year level.

Response:

--

6.4.5 Delivery of curriculum

Please provide details of the plan to teach and deliver your curriculum across all your proposed year levels within the funding levels set out in your financial plan.

Response:

--

6.4.6 If you are not offering all subjects as face to face delivery, which ones will be delivered on-line or via a partnerships with other schools or tertiary institutions? Please provide details of what is proposed.

Response:

--

6.5 Assessment and achievement

6.5.1 What is your overall approach to assessing student’s progress in relation to your student achievement goals?

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

Response:

6.5.2 Outline how you will enable individual students to ‘catch up’ academically if they are well behind expected standards for their age group when they enrol.

Response:

6.6 Student behaviour management and safety

6.6.1 Outline the school’s philosophy and methodology regarding student behaviour management and participation in school activities.

Response:

6.6.2 Provide a description of your pastoral care process.

Response:

6.6.3 Set out your strategy, and approach to the school’s provision of a safe, orderly, and drug-free environment.

Response:

6.6.4 Set out your strategy, and approach to suspension, expulsion and other disciplinary matters.

Response:

6.7 Transitional arrangements for students leaving this school

6.7.1 If students at your school will need to transition to another school to complete their years in the compulsory system, explain how any challenges involved in this transition will be managed or facilitated.

Response:

7 School Leadership and Teacher Quality

7.1 Organisational structure

7.1.1 Provide the organisational chart of the proposed school.

Clearly delineate between personnel of the school, subcontractors, supplier and volunteers across:

- a) Governance
- b) Management
- c) Administration, and
- d) Subcontract arrangements (if applicable).

Response:

7.2 Governance and management

7.2.1 Provide an overview of the governance and management arrangements for the proposed School.

Response:

7.2.2 What is the role of the Sponsor in the ongoing operation of the school? What will be the relationship split between the Sponsor and the governance board?

Response:

7.3 Recruitment and retention of resources

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

Response:

7.3.2 If known, list in a table the names and qualifications of persons who will hold key leadership roles in the school. Provide CVs (or position descriptions for positions which will need to be recruited) as an appendix to your Application.

Response:

7.3.3 Describe your approach to attracting, recruiting and retaining staff. If the school you are proposing is to be located in a remote area, explain how you will address the particular challenge this presents in terms of attracting high quality teachers.

Response:

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

Response:

7.4 Professional development

7.4.1 Detail your proposed professional development plans for teachers at the school (including any sub-contractors or volunteers who will be supporting the students' learning).

Response:

7.4.2 What support and mentoring is proposed for any staff who do not hold a Practising Certificate or Limited Authority to Teach (if applicable)

Response:

7.4.3 Outline your approach to teacher assessment and appraisal and how it will contribute to a culture of continuous development within the school.

Response:

8 Community Outreach and Engagement

8.1 How will you develop community support and engagement with your proposed school? How will you utilise the partnerships to create new opportunities for students.

Response:

8.2 What partnerships have you established or intend to establish to support the school and its students and school community/whānau? How will you utilise the partnerships to create new opportunities for students?

(Note section 10 contains a question specific to tangible and financial support for the school)

Response:

8.3 Describe your proposed methods or structures to ensure teacher, parent, family/whānau and student input to decisions that affect the school.

(Note: include how you intend to monitor the effectiveness of methods and structures that are being proposed).

Response:

8.4 Explain the relationship your school intends to develop with community agencies and organisations that serve students who attend the school.

(Response should include ways in which these will be delivered and how these will be monitored for effectiveness).

Response:

8.5 How will you target and engage with parents/family/whānau who may not be engaged in their child's learning, to assist them in supporting and becoming more involved in the learning process? Describe the specific strategies you propose and evidence that these will be successful.

Response:

9 Premises

9.1 Outline your proposed facilities.

Include information on:

- a) the type of property arrangement and the terms of the tenancy (if applicable);
- b) how this site would be a suitable facility for the proposed school, including any plans to renovate; or
- c) if a site has not been identified, your present options for the school site, including a timetable for identifying and acquiring or leasing a facility;
- d) your financing plans for acquisition and renovation of a facility; and
- e) your plans for expanding school facilities matching your projected roll numbers, including how you will attract additional staff and acquire other resources needed to serve a larger student body.

Response:

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

Response:

10 Implementation Plan

10.1 Strategic partnerships including alternative sources for funding and resources

10.1.1 Non Government Investment

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

Response:

10.1.2 Building on information provided in your EOI response, outline details of partnerships and organisations providing tangible support, including additional sources of funding or resourcing.

Please provide detailed information on each type of support you will be seeking.

- a) Clearly state for each partner or organisation whether you have already requested or secured the support from each of these organisations in establishing or operating the proposed partnership school.
- b) Provide 1-2 bullet points of information for each potential partner.
- c) Include tangible evidence of support such as letters of support or MOUs from the partners/organisations.

Response:

10.2 Detailed implementation plans

10.2.1 Provide two detailed implementation plans covering:

- a) the period from gaining approval to the opening of the school, and
- b) the period from the opening of the school to the end of the first year.

[May be provided as attachments as Appendix 1 and Appendix 2]

Response:

10.3 Financial models and forecasts

10.3.1 Complete the templates in the attached MS Excel workbook with your proposed financial forecasts. Guidance on how to complete the forecasts is provided in the spreadsheet. The worksheet covers three components

- a) Financial forecast (budget), cash flow and balance sheet
- b) Student roll
- c) Staffing levels

Response: [Applicant to confirm completion of the enclosed workbook]

11 Acceptance of Draft Agreement

The Crown's commercial position is reflected in the draft Agreement attached as Schedule 1 to this RFA (the Draft Agreement).

Each Applicant is asked to confirm their acceptance of the Draft Agreement. If you would not be prepared to enter into the Draft Agreement in the form attached, please include in your proposal the amendments you consider are required to the form of contract and the reasons you are requesting them, propose an alternative position that would protect the interests of both parties and confirm that all the other clauses in the agreement are acceptable.

Clause number	Detailed explanation of why the clause is unacceptable	Proposed new position that protects the interests of both parties

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

Should an Applicant be selected to proceed to contract negotiations, only those provisions identified as requiring amendment in the Application and any entirely new provisions that the Minister may introduce as forming part of the final Contract can be the subject of contract negotiations. Any attempt by any Applicant to raise new or different issues may result in the Minister terminating contract negotiations with that Applicant.

12 Assumptions, Risks and Caveats

Please complete the table listing all of the assumptions, risks and caveats made throughout your proposal.

Reference	Type (A / R / C)	Subject	Comment
1			
2			

13 Applicant Declaration

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

Topic	Requirement	Applicant's declaration
RFA response:	<p>The Applicant has prepared this application independently to operate a partnership school.</p> <p>OR jointly with [insert name of Applicant#2]</p> <p>OR in consortium with [insert names of each consortium Applicants]</p>	agree / disagree
RFA terms:	The Applicant has read and fully understands this RFA, and the RFA terms in part two of the Requirements and Rules of this RFA, and agrees to be bound by them.	agree / disagree
Collection of further information:	<p>The Applicant authorises the evaluators:</p> <ul style="list-style-type: none"> • to collect any information about the Applicant, from any relevant third party, including a referee, or previous or existing client, and • to use such information in the evaluation of the Applicant's application. 	agree / disagree
Objectives and Requirements:	<p>The Applicant has read and fully understands the nature and extent of what is required by the Ministry and the Minister as described in parts one and two of this RFA.</p> <p>The Applicant has the necessary capacity and capability to fully meet or exceed the deliverables in the operation of a partnership school and will be available to operate their partnership school throughout the proposed contract period.</p>	agree / disagree
Contract terms and conditions:	The Applicant has read and fully understands and accepts the Agreement terms and conditions as stated in the proposed conditions of contract or has completed the table of proposed contract derogations in the form set out in the table at section 11 of this response form. If successful, the Applicant agrees to sign a contract based on	agree / disagree

	these terms and conditions.	
Conflict of interest:	The Applicant warrants that it has no actual, potential or perceived conflict of interest in submitting this application, or entering into a contract to operate a partnership school. Where a conflict of interest arises during the RFA process the Applicant will report it immediately to the Contact Person.	agree / disagree
Ethics:	<p>The Applicant warrants that in submitting this application it has not:</p> <ul style="list-style-type: none"> • entered into any improper, illegal, collusive or anti-competitive arrangements with any competitor • directly or indirectly, approached any representative of the Minister, Ministry or the Board to lobby or solicit information in relation to the RFA (except where allowed for during the clarification period). • attempted to influence, or provide any form of personal inducement, reward or benefit to any representative of the Minister, Ministry or the Board. 	agree / disagree
Offer validity period:	The Applicant confirms that this application remains open for acceptance for a period of one year from the closing date.	agree / disagree
Publication of Application details	The Applicant accepts that, due to public interest associated to this application process, it is intended that the submitted application will be made publicly available on the Ministry of Education website, subject to any deletions that would be justified if the information had been requested under the Official Information Act 1982.	agree / disagree
Declaration:	<p>The Applicant declares that in preparing this Application it:</p> <ul style="list-style-type: none"> • has provided complete and accurate information in all parts of the application, in all material respects • has secured all appropriate authorisations to submit this application and is not aware of any impediments to its ability to enter 	agree / disagree

	<p style="text-align: center;">into a formal contract to deliver the outcomes.</p> <p>The Applicant understands that should it be successful in being awarded a contract with the Crown, then the falsification of information, supplying misleading information or the suppression of material information in relation to this RFA will be grounds for termination of the contract.</p>	
--	--	--

DECLARATION

- This application has been approved, and is signed by, a representative of the Applicant who has the authority to do so. This representative is named below.
- This representative declares that the particulars provided above and in the attached application documents are accurate, true and correct.

Signature:	
Full name:	
Title / position:	
Date:	