

E Tipu e Rea

Providing independent support to New Zealand's
Partnership Schools | Kura Hourua

Working session to assist with Round 5 – applications for Expressions of Interest

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Chief Executive
E Tipu e Rea Ltd
23 February 2017

Programme for the day

Programme for EOI Workshop | 23 February 2017 at Cognition Education (16 Normanby Road, Ground Floor, Eden 3, Mt Eden)

	Time	Notes	Who
1.	1000 – 1030	Assemble from 1000 Tea / Coffee provided	-
2.	1030 - 1045	Welcome & Introductions – setting the scene	Graeme Osborne
3.	1045 - 1200	Background considerations	Chris Sullivan (Cognition)
4.	1200 – 1230	Lunch	
5.	1230 - 1400	A Journey through the EOI Application	Graeme Osborne
6.	1400 - 1500	Q & A	Graeme Osborne
7.	1500	Conclude	GO

E Tipu e Rea

Providing independent support to New Zealand's Partnership Schools | Kura Hourua

The Partnership Schools | Kura Hourua policy

- Initially championed by the ACT Party
- Enables the direct participation of private sector interests and community thinking into education
- Provides increased freedom to innovate within the bounds of strengthened accountability for educational outcomes
- Maintains the initial focus on addressing Maori / Pasifika / Decile 1-3 educational under-achievement
- Focus now expanded to support Government technology agenda

Whakatauki – Thrive & Grow

Sir Apirana Ngata

‘E tipu, e rea, mō ngā rā o tō
ao; ko to ringaringa ki ngā
rākau a te Pākehā hei oranga
mō tō tinana; ko tō ngākau ki
ngā taonga o ō tipuna hei
tikitiki mō tō māhunga. Ko tō
wairua ki tō Atua, nāna nei ngā
mea katoa.’

‘Grow tender shoot for the
days of your world. Turn your
hand to the tools of the Pākehā
for the wellbeing of your body.
Turn your heart to the
treasures of your ancestors as
a crown for your head. Give
your soul unto God the author
of all things.’

The key Partnership School | Kura Hourua sector players

Entity	Role
Minister of Education	Ultimate responsibility for the actions of the Ministry
Under Secretary to the Minister of Education (David Seymour)	Guardian of the PSKH Policy (Which originated as an ACT Party policy)
The Ministry of Education	Manages the contract interface with the PSKH Manages funding elements Secretariat to the Authorisation Board
The Authorisation Board	Acts independently Manages the approval process for PSKH Monitors PSKH performance
Partnership Schools	Deliver educational services under contract to the Ministry Report quarterly and annually to the Ministry Subject to Education Review Office review
E Tipu e Rea	Provides independent support to New Zealand's partnership schools <ul style="list-style-type: none">Promote and grow the PSKH sector

E Tipu e Rea Limited (ETeR)

- E Tipu e Rea Trustee Ltd was incorporated on 08 December 2015 (Company number 5841023) and registered with the Charities Commission (CC53193) on 22 April 2016.
- E Tipu e Rea Limited was incorporated on 15 December 2015 (Company number 5841127) and registered with the Charities Commission (CC53225) on 28 April 2016.

ETeR Context

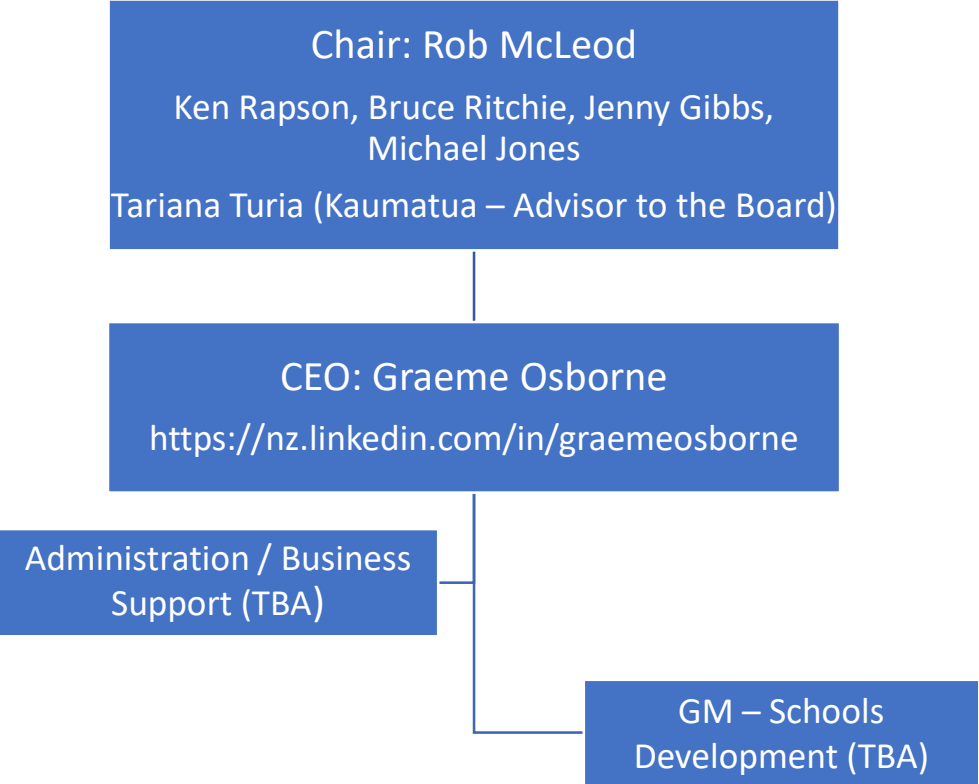
- Established at the initiative of Partnership Schools | Kura Hourua
- Receiving seed funding of \$500,000 over two years from the Ministry of Education
- Obligations to the Ministry of Education specified by way of a funding contract (refer to link provided)
<http://www.education.govt.nz/assets/Documents/Ministry/Information-releases/Partnership-schools-information-release/PSKHSupportEntityAgreement.pdf>
- Currently receives non Government funding support from Aotearoa Foundation, Alan Gibbs

Key contractual expectations of ETeR

Develop the pipeline of sponsors:	Support applicants:	Provide ongoing support:	Broker support:	develop a pipeline of high-quality teachers and leaders to work in Partnership Schools.
engage with interested parties to promote the model and develop a diverse pool of potential sponsors	work with prospective sponsors to ensure that they put forward strong, realistic applications in any selection rounds	support sponsors in the setting up and ongoing operation of their schools	act as a broker between potential and actual sponsors, and philanthropic or business organisations that might wish to support Partnership Schools	This might include providing professional development and matching suitable candidates with Partnership Schools

NOTE: the term 'sponsor' refers to the 'proprietor' of the Partnership School

The shape of ETeR



Timeline



Important Note

- *All / any material provided by E Tipu e Rea is for information purposes only. It does not necessarily reflect the position of Government including the Ministry of Education and the Authorisation Board. It does not in any way amend or influence any procurement or selection process.*
- *For questions and information in relation to an expression of interest, request for application, tender or its subject matter, applicants should refer to the conditions issued with the request documents and address the questions to the Ministry's point of contact.*

‘The Government is contracting for outcomes’

'The Government is contracting for outcomes'

Looking to the Contract

Schedule	Measure
Schedule 1:	Negotiated minimum roll must be met during and at year-end (and be within negotiated maximum roll)
Schedule 2:	Specifies curriculum / qualifications Need to develop a 'publicly available' curriculum handbook for opening day.
Schedule 3:	School transport (if any)
Schedule 4:	# Teaching positions # Teaching positions to hold a Practising Certificate or Limited Authority to teach 80% Teaching time to be taught by people holding a Practising Certificate or a Limited Authority to teach
Schedule 5:	Premises as proposed to the Minister 90 days (or as otherwise agreed) in advance of opening, and approved in writing by the Minister (including location, # rooms, multi storey or not, outside areas etc)

‘The Government is contracting for outcomes’

Schedule		
Schedule 6:		Performance Management System
	1.	Objectives
	2.	Performance Standards
	2.1	Student Achievement (Outlines Performance Standards in relation to Student Achievement that will be ‘periodically assessed’)
	2.2	Student Engagement <ul style="list-style-type: none"> • Unjustified absences (0.28 x roll x open days) (reported quarterly), • Stand downs (2.1 / annum / 100 students) (reported as they occur) • Suspensions (Higher of 1 or 0.42 / 100 students / annum) (reported as they occur) • Exclusions (Higher of 1 or 0.15 / 100 students / year (reported as they occur) • Expulsions - 0 • School Culture (wellbeing@school annual student survey)
	2.3	Financial Performance (Operating surplus (2% - 5%), Working capital ratio, Debt / Equity ratio, Operating Cash, Solvency – all reported quarterly)
	2.4	Targeted Priority Learners (set at 75%). Wont necessarily apply to STEM Schools.
	ANNEX A	Specifies success targets for National Standards / Nga Whanaketanga Rumaki Maori / NCEA

Getting started

(Answer the question – word count)

Important elements of the EOI	Weighting	Important elements of the EOI	Weighting
1. The capability of the Sponsor <ul style="list-style-type: none"> Overview of the Sponsor Capability to operate a Partnership School Governance Financial management capability 	20%	4. School Leadership and Teacher Quality <ul style="list-style-type: none"> School Leader Recruitment of High Quality Teachers 	15%
2. The Special Character and Key Focus of the School <ul style="list-style-type: none"> Special Character: Distinctive Concept School Mission Statement Innovation Student cohort: demographic information Meeting Priority Learner / STEM outcomes Evidence of use of flexibilities of the Partnership School model 	20%	5. Achieving enrolments <ul style="list-style-type: none"> School model that will appeal to the cohort Enrolment Plan 	10%
3. Educational Programme <ul style="list-style-type: none"> Curriculum Qualifications Subject Choices (if Secondary) Curriculum Development Future Education and Career Pathways for Students 	20%	6. Sourcing of School Premises and other Major Resources <ul style="list-style-type: none"> School Premises Other Major Resources 	5%
		7. Partnerships <ul style="list-style-type: none"> Community Engagement Additional Resources and Funding Table of educational, business and community supporters 	10%
		Total Weighting	100%

Fleshing out

- Sector credibility
- Demonstrating Credibility, Capability, Competence (Need to achieve quality)
 - Governance
 - CEO
 - Professional Leader
- Special Character
 - Use of flexibilities
 - Innovation
- Educational Programme
 - Curriculum
- Feasibility
- Logistics
- Engaging with the School Community
- Opening roll / maximum roll / minimum roll
(The issue of expansion / replication)

Key links

- The application package
<https://www.gets.govt.nz/MEDU/ExternalTenderDetails.htm?id=18381396>
- Continue to monitor the GETS site for questions / answers related to the tender process
- Part 12A of the Education Act 1989 refers to Partnership Schools
<http://www.legislation.govt.nz/act/public/1989/0080/latest/DLM5292469.html>
- The funding formulae

Key elements of applications

Key Ministry of Education Values:

- Effective use of PSKH flexibilities
- Demonstration of learning pathways for its students into future education (should the student choose it)
- Partnerships with community and other organisations
- Accountability to meet agreed standards including student achievement
- Focus on educational performance rather than facilities and property
- Increased flexibility to decide how to operate and use funding, and
- High trust between the Minister/Ministry and sponsors in order to achieve the agreed outcomes.

Key elements of applications ... continued

Governments expectations (from the EOI documents):

Sponsors operating Partnership Schools are expected to be either:

- **STEM focused:** (science, technology, engineering and/or mathematics) education to deliver more science, technology, engineering and/or maths competent learners and encourage more students to choose STEM educational and career pathways; or
- **Priority learner focused:** focused on raising the achievement among priority students. Delivering a targeted response to educational underachievement in disadvantaged areas. It is expected that 75% of enrolments will be from priority learner groups – Māori, Pasifika, students with specialist education needs and students from low socio-economic backgrounds.

Key elements of applications ... continued

Governments expectations:

Applicants will need to demonstrate during the application process that they have the capability to meet all of the following:

- **Engage** effectively with parents, family/whānau and communities to support and contribute to achieving high educational outcomes for their children
- **Use** the freedoms available through this model to lift the educational performance of students
- **Deliver** high-quality educational programmes with a strong focus on performance
- **Meet** specified performance standards agreed with the Crown, including student academic achievement, and
- **Have** strong governance and the organisational capacity and capability required to ensure the high-quality management and operation of the school.

The MoE / Sponsor Contract

Clause E: The way we will work together

- a. the interests of the Students will be front of mind for both parties;
- b. both parties will act in an open and transparent manner with each other;
- c. both parties will adhere to principles of good faith;
- d. both parties will foster a long-term and co-operative relationship to enable both parties to achieve their mutual objectives efficiently and effectively;
- e. both parties agree to co-operate with each other and to raise and discuss matters with one another where appropriate; and
- f. both parties agree to discuss the resolution of any issues or problems that may arise in relation to the interpretation or application of this Agreement

The Contract ... continued

Clause F: Values

The parties agree that the key values of the Partnership School/Kura Hourua model are:

- partnerships with other organisations (such as businesses, philanthropists, iwi, community organisations, faith-based groups, private schools and culture-based education organisations);
- accountability to meet agreed targets including student academic achievement
- focus on educational performance;
- flexibility to decide how Partnership Schools/Kura Hourua operate and use funding; a
- high trust between the Minister/Ministry and Sponsors, in order to achieve the agreed outcomes.

Funding formula (ex GST)

- The formula for the property fund is at:

<http://www.education.govt.nz/school/property/state-schools/property-planning/space-entitlement/>

- Establishment Funding

The Establishment Funding is made up of 3 components:		
	Primary School Years 1- 8	Secondary Schools Years 9 – 13
Set Up component	\$250,000	\$400,000
Principal's Salary	Up to 4 terms at	Up to 5 terms at
	\$32,500/term	\$32,500/term
Property and insurance	The equivalent of 6 months of year 1 property funding	The equivalent of 6 months of year 1 property funding

Funding formula

Primary		Roll					
Roll	Rate (\$)	50	100	150	200	250	300
Space Entitlement (m2)		376	666	941	1209	1473	1831
m ² /Primary pupil		7.5	6.7	6.3	6.0	5.9	6.1
Property & Insurance	\$154.58 per m2	\$ 58,122	\$ 102,950	\$ 145,460	\$ 186,887	\$ 227,696	\$ 283,036
Teaching and Operating (roll 1-50)	\$8,579 per student	\$ 428,950	\$ 428,950	\$ 428,950	\$ 428,950	\$ 428,950	\$ 428,950
Teaching and Operating (51+)	\$5,247 per student	-	\$ 262,350	\$ 524,700	\$ 787,050	\$ 1,049,400	\$ 1,311,750
Professional Development and Resources	\$276 per student	\$ 13,800	\$ 27,600	\$ 41,400	\$ 55,200	\$ 69,000	\$ 82,800
Total		\$ 500,872	\$ 821,850	\$ 1,140,510	\$ 1,458,087	\$ 1,775,046	\$ 2,106,536

Funding formula

SECONDARY		Roll					
Roll	Rate (\$)	50	100	150	200	250	300
Space Entitlement (m2)		1259	2036	2753	3543	3930	4301
m2 / Secondary pupil		25.18	40.72	55.06	70.86	78.6	86.02
Property & Insurance	\$188.58 per m2	\$237,422	\$383,949	\$519,161	\$668,139	\$741,119	\$811,083
Teaching and Operating (1-100)	\$12,585 per student	\$629,250	\$1,258,500	\$1,258,500	\$1,258,500	\$1,258,500	\$1,258,500
Teaching and Operating (101+)	\$7,046 per student	-	-	\$352,300	\$704,600	\$1,056,900	\$1,409,200
Professional Development and Resources	\$276 per student	\$13,800	\$27,600	\$41,400	\$55,200	\$69,000	\$82,800
Total		\$880,472	\$1,670,049	\$2,171,361	\$2,686,439	\$3,125,519	\$3,561,583

Worked examples

Payment Schedule

- Payments are quarterly in advance.
- Each quarterly payment is made up of each of the components –
 - Property and Insurance
 - Centrally Funded Support (now called Professional Development and Resources)
 - Base Funding and Per Student Funding (Now called Teaching and operating)
 - Professional Development

Conclude