



Request for Application to operate a Partnership School | Kura Hourua opening in 2015.

Part Two - Application Form

Submitted By:

[Insert name of Applicant Organisation here]

[Proposed name of school here (if applicable)]

ISSUE DATE	19 December 2013
CLOSE DATE	11 March 2014 12:00 pm

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Introduction

This document is the form of response to the Request for Application to operate a Partnership School | Kura Hourua (Partnership Kura) opening in 2015. Please follow the overarching instructions set out in Part One – Requirements and Rules.

NOTE:

Your Application must not exceed 100 pages. This includes supporting attachments, but excludes the following sections:

- Cover page
- Table of content
- Notice of Intent to respond
- Applicant contact details
- Assumptions, risks and caveats
- Applicant organisation overview
- Applicant declaration
- Applicant checklist.

1 Applicant Contact Details

i. Contact person for this Application

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

ii. Sponsor Organisation

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

Full legal name:		
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	Yes / No – <i>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>	
Country of residence:	NZ	Other _____

iii. 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 Applicant Profile

i. Applicant Organisation

- a) Do you intend to establish a new legal entity to run the school? (delete non applicable)

Response

Yes / No (If yes, please provide details)

- b) Will the Sponsor organisation run the school or subcontract some or all of the operation of the school to other parties (delete non applicable)?

Response

Sponsor intends to run school / Sponsor intends to subcontract the operation of the school (If the latter, please provide details)

ii. Overview of Applicant's organisation

Type of organisation:	brief description of the type of business the organisation specialises in
Year established:	
History:	brief history of organisation including current operations
Summary of experience relevant to your application to operate a Partnership Kura:	
Total number of staff in NZ:	
Number of locations in NZ:	
Overseas locations:	state any other country where organisation has an operational presence

iii. Current business commitments

Business activities:	List organisation's current business activities (e.g. commitments, projects, contracts). State any known limitation or constraints on the organisation being able to deliver against the application requirements
Other Contracts with government	List any past or current agreements held with any government departments for delivery of services.

iv. Probity

List any pending claims against the organisation:	
List any court judgments or other decisions that have been made against the organisation in the last 6 years:	

v. Proposed Subcontractors

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

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:	

Copy and add more Tables as required

vi. Financial Information

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	

3 School Overview

The School Overview section is a summary of the information set out in the body of your application, and should only be completed once your application is prepared. This is an unassessed section of the application, and is only used for information purposes by assessors.

i. School Location

Enter the address / location of your proposed Partnership Kura.	
Do you propose to operate the school at more than one location? If yes, provide the proposed locations for each of the sites.	

ii. Year Groups

List the year groups that your school proposes to serve.

iii. Priority Learner Groups

Enter the estimated number of students from each of the priority learner groups that will attend your school, when the roll is full. Ensure that the numbers used in this section are reflective of the demographic data you have set out in the body of your application.

Māori	Pasifika	Children from low socio economic backgrounds	Children with special education needs

iv. 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 school roll and 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 to below.
2. Delete the rows for the year levels that do not apply to the proposed school.

Year	2015 Roll	2016 Roll	% Change	2017 Roll	% Change	2018 Roll	% Change	2019 Roll	% Change
1									
2									
3									
4									
5									
6									
7									
8									
9									
10									
11									
12									
13+									
Other [list]									
Total									

4 Executive Summary

1. Provide an executive summary of no more than 800 words that clearly sets out the distinctive mission of your proposed school, why you are planning on establishing it, what it will achieve, and how it will achieve it.

Note

An initial evaluation of your application will be made on the basis of this summary. It is important that you be as specific as possible, and include the following;

- *A compelling 1-2 sentence mission statement that sets out the purpose of your school;*
- *A coherent and concise description of what the school will look like in 5-10 years if it is achieving its mission;*
- *A coherent and concise summary of the school's performance goals and how they will be measured; and*
- *A clear description of the student population/priority goals the school will serve.*

Response

5 PURPOSE AND GOALS

2. Provide a statement of purpose and goals that:
 - a) sets out your distinctive mission and vision, including:
 - i) why you are proposing to open your school;
 - ii) what makes it unique and sets it apart from existing provision; and
 - iii) how it will enable improved student engagement and achievement;
 - b) defines the schools performance objectives and how these will be achieved and measured;
 - c) provides demographic evidence that demonstrates the need for a new school and/or new school places in your proposed location and
 - d) outlines the key advantages of your application, including the educational track record of the sponsoring organisation.

Response

6 EDUCATIONAL PLAN

3. Describe the curriculum to be used. If you are not using The New Zealand Curriculum or Te Marautanga o Aotearoa, please
- explain and provide evidence to support why you have chosen an alternative curriculum; and
 - outline how your alternative curriculum aligns with *The New Zealand Curriculum* or *Te Marautanga o Aotearoa*.

Response

4. Detail how you plan to teach and deliver your curriculum across all your proposed year levels.

Response

5. Explain how the teaching and delivery of the curriculum will produce better achievement outcomes for the priority learner groups.

Response

6. Provide a full list of the qualifications that your school will offer (if applicable).

Response

7. Explain why you are confident students will be able to achieve the National Standards (those in Years 1-8) or your proposed qualifications using the curriculum and teaching methods you have proposed. Be specific and provide evidence such as student achievement data where possible..

Response

8. If you plan on targeting Māori students, outline your plans for:

- a) achieving success for Māori in education, so that students are enjoying and achieving success as Māori
www.minedu.govt.nz/theMinistry/PolicyandStrategy/KaHikitia.aspx; and
- b) supporting Māori language in education: delivering strong, co-ordinated effort and investment
www.minedu.govt.nz/theMinistry/PolicyAndStrategy/TauMaiTeReo.aspx)

Response

9. If you plan on targeting Pasifika students, outline your:

- a) plans for achieving Pasifika success using students' identities, languages and cultures as foundations to build upon
www.minedu.govt.nz/NZEducation/EducationPolicies/PasifikaEducation.aspx ;
- b) how the school will build its own Pasifika capability; and
- c) how partnerships (as identified in question 14(c)) with Pasifika parents, families and communities are used to achieve Pasifika Success

Response

10. Outline how you will ensure an inclusive environment for students with special education needs, including:

- a) how the school will demonstrate inclusive practices;
- b) how the school will build its capability to address the needs of students with special education needs; and
- c) how partnerships with parents with students with special education needs are used to achieve education success.

11. If you propose to operate a secondary school and are planning to offer a full subject range, explain how this will be resourced within the funding levels set out in your financial plan.

Response

- 12. If you are proposing to provision for 0-8 year olds, explain how you will manage the requirements set out in the ECE regulations and the obligations of a Partnership School as set out in key documents (including legislation and the contract).**

Response

- 13. Detail tests, measures and tools, or other assessment tools that you propose to use, including:**

- a) how student progress and achievement will be measured, tracked, reported and responded to, particularly in relation to National Standards (if applicable); and**
- b) how assessment and/or aromatawai will be used to tailor instruction.**

Response

- 14. Explain how your school will:**

- a) work with students, parents, families/whānau and community to promote high attendance levels**

Response

- b) develop family-school partnerships that focus on strengthening support for learning, improving communication, and encouraging parent/family/whānau involvement in school operations**

Response

- c) work with parents/families/whānau and community so they have the information and training they need to better support and become more involved in the learning process**

Response

- d) communicate with parents/families/whānau and community concerning the school's progress and achievements**

Response

- 15. Explain the relationship your school intends to build with community agencies and organisations that serve students who attend the school.**

Response

- 16. Outline any commitments that the school has made for partnerships or other relationships with community organisations or individuals that would enrich the learning opportunities for students attending the school.**

Response

- 17. Detail any plans to use external providers to deliver parts of the educational programme (if applicable). Provide a full explanation of how this will work in practice.**

Response

- 18. Explain and provide evidence to support your proposed school calendar setting out:**

- a) the daily hours of operation;**

Response

- b) indicative student timetables; and**

Response

- c) how the school day and year will be organised to include instruction and assessment, independent study, professional development, parent-teacher conferences, and extra or co-curricular activities.**

Response

- 19. Outline the school's philosophy and methodology regarding student behaviour, discipline and participation in school activities.**

Response

- 20. Set out your strategy, policy and procedures that will ensure the school is a safe, orderly, and drug-free environment where both teachers and students can feel secure and where effective learning can take place (in line with the provisions under the Education Act 1989 and any other applicable Acts).**

Response

- 21. Detail your proposed professional development plans for teachers, administrators and other school staff, including:**

- a) how the sponsors and/or the management team will be involved in the design and identification of such opportunities**

Response

- b) the support and mentoring proposed for any staff that are not registered teachers (if applicable)**

Response

- c) how your proposed programme of professional development will enable the school to meet the needs of priority students.**

Response

- 22. If you are proposing to use non-registered teachers, explain 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 BUSINESS PLAN

23. Outline the different structures (in both chart and narrative form) of your proposed Partnership Kura, including:

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

Response

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

Response

25. Provide two detailed implementation plans covering:

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

Response

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

26. 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)
- b) Balance sheet
- c) Student Roll
- d) Staffing levels

Response

[Applicant to confirm completion of the workbook titled “RFA PSKH Budget template.xlsx”]

27. Detail the amount and terms of any funding (additional to funding to be provided by the Crown) that is to be provided to the school, including:

- a) what you propose this funding will be used to provide; and
- b) the relationship between the school and the funder.

Response

28. Outline your proposed:

- a) financial management and internal accounting procedures for the school, including controls that will be put in place to ensure appropriate fiscal accountability;
- b) provisions for conducting annual audits of the financial operations of the school; and
- c) types and levels of insurance that you propose to operate the school.

Response

29. Outline your proposed facilities, including:

- 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) describe 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

30. 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

8 OPERATIONS PLAN

31. Explain how the school will:

a) achieve the enrolment target you have projected in Q2.(v);

Response

b) be publicised throughout the community, including any specific outreach activities or similar;

Response

c) target parents/family/whānau who may not be engaged in their child's learning;

Response

d) identify and develop relationships with community organisations that can assist in marketing with parents/family/whānau; and

Response

e) if proposing to convert an existing school, the nature and medium to advise the community of the proposed conversion.

Response

32. Outline your enrolment policy and describe your proposed timeline for enrolling students for the 2015 school year.

Response

- 33. Outline the suspension, expulsion and other disciplinary policies and procedures of the proposed school, and the criteria for making decisions on such matters, demonstrating how these align with the terms of the Education Act 1989, Section 158V and the Ministry of Education's Stand-downs, Suspensions, Exclusions And Expulsions Guidelines.**

Response

- 34. 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

- 35. Outline the process that will be used in the recruitment of teachers, administrators, and other school staff.**

Response

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

Response

- 37. Outline the processes that will be used to achieve the desired quality of staff and controls you will apply to ensure that background checks, including Police vetting, are conducted on all school personnel, including volunteers and contractors, prior to the beginning of their employment or service.**

Response

38. Outline your proposed key policies regarding salaries, contracts, hiring and dismissal, evaluation of staff, benefit plans, and other matters related to staffing.

Response

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

Response

40. If you propose to use volunteers and/or contractors, outline:

- a) the roles (where not disclosed in section 10(v) of this form);**
- b) how they will be identified, vetted and trained.**

Response

41. Outline how the school proposes to meet and maintain the required health and safety standards.

Response

9 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 its 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.

10 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			

11 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 Kura.</p> <p>OR jointly with [insert name of Applicant#2]</p> <p>OR in consortium with [insert names of consortium Applicants]</p>	agree / disagree
RFA terms:	The Applicant has read and fully understands this RFA, and the RFA terms in Part Three of this RFA, and agrees to be bound by them.	agree / disagree
Collection of further information:	<p>The Applicant authorises the evaluators to:</p> <p>collect any information about the Applicant, from any relevant third party, including a referee, or previous or existing client</p> <p>to use such information in the evaluation of the Applicant's Application.</p>	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 Kura and will be available to operate their Partnership Kura 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 paragraph 8 of this Part Three of the RFA. If successful, the	agree / disagree

	Applicant agrees to sign a contract based on 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 Kura. 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> <p>entered into any improper, illegal, collusive or anti-competitive arrangements with any competitor</p> <p>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).</p> <p>has not attempted to influence, or provide any form of personal inducement, reward or benefit to any representative of the Minister, Ministry or the Board.</p>	agree / disagree
Offer validity period:	The Applicant confirms that this Application remains open for acceptance for a period of 180 days from the Closing Date.	agree / disagree
Applicant interview	The Applicant acknowledges that if requested, the Applicant will be available to attend an interview in Wellington at a location to be determined by the Board over a one week period, with time slots given on a first-in first-served basis.	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:	The Applicant declares that in preparing this	agree / disagree

	<p>Application it:</p> <p>has provided complete and accurate information in all parts of the Application, in all material respects</p> <p>has secured all appropriate authorisations to submit this Application and is not aware of any impediments to its ability to enter into a formal contract to deliver the outcomes.</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>	
<p>DECLARATION</p> <p>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.</p> <p>This representative declares that the particulars provided above and in the attached Application documents are accurate, true and correct.</p>		
Signature:		
Full name:		
Title / position:		
Date:		

12 Applicant Check List

The checklist is included for your reference only.

Action Required	Done
1. Submit the Intent to Respond Notification (refer separate document) to partnership.schools@minedu.govt.nz by 5:00 PM Wednesday 22 January 2014	
2. Submit all questions requiring clarification (if required) by 5:00pm, Wednesday 26 February 2014	
3. Complete all required sections of the application.	
4. Submit your CD Rom / memory stick and paper copies of the following documents by 12:00 (Noon) Wednesday 12th March 2014	
Nine paper copies of your Application in a Word format (with at least one copy unbound and/or stapled)	
One paper copy of the Excel spreadsheet containing your commercial information/financial details	
One CD Rom or memory stick containing an electronic copy of all of the sections of your application	