

## 7 Evaluation

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### 7.1 How your Application will be evaluated

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It is intended that the evaluation process will include the following phases:

- 1 detailed assessment of each Application against the Evaluation Criteria;
- 2 extent of acceptance of the Draft Agreement for Service;
- 3 each Application allocated an initial evaluation score;
- 4 requests for clarification and/or additional information from Applicant(s) (if required);
- 5 evaluation scores amended or confirmed and a short list of Applicants determined;
- 6 if required, assessment of short listed Applicants' interview based on a meeting agenda provided by the Contact Person;
- 7 evaluation score updated and a revised (if any) list of Preferred Applicants determined;
- 8 reference checks for Preferred Applicant(s) confirming their capability and capacity with nominated referees;
- 9 evaluation score updated and a revised (if any) list of Preferred Applicant(s) determined;
- 10 Preferred Applicants/s considered for approval by the Minister;
- 11 contract negotiations with Preferred Applicant(s);
- 12 awarding of Agreement to Successful Applicant(s) (if any), in the agreed form;  
and
- 13 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.

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.

Criteria	Weighting
Statement of Purpose and Goals	15.0%
Educational plan	35.0%
Business Plan	17.5%
Operational Plan	17.5%
Financial Plan	15.0%

<b>Total</b>	<b>100%</b>
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Each question will be evaluated using the following scale

Rating	Definition	Score
Excellent	Exceeds the requirement. Exceptional demonstration by the Applicant of the relevant ability, understanding, experience, skills, resource and quality measures required to deliver the outcomes. Application identifies factors that will offer potential added value, with supporting evidence.	5
Good	Satisfies the requirement with minor additional benefits. Above average demonstration by the Applicant of the relevant ability, understanding, experience, skills, resource and quality measures required to deliver the outcomes. Application identifies factors that will offer potential added value, with supporting evidence.	4
Acceptable	Satisfies the requirement. Demonstration by the Applicant of the relevant ability, understanding, experience, skills, resource, and quality measures required to deliver the outcomes with supporting evidence.	3
Minor Reservations	Satisfies the requirement with minor reservations. Some minor reservations of the Applicant's relevant ability, understanding, experience, skills, resource and quality measures required to deliver the outcomes, with little or no supporting evidence.	2
Serious Reservations	Satisfies the requirement with major reservations. Considerable reservations of the Applicant's relevant ability, understanding, experience, skills, resource and quality measures required to deliver the outcomes, with little or no supporting evidence.	1
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, resource & quality measures required to deliver the outcomes, with little or no supporting evidence.	0

## 7.2 Contestable, competitive process

1. Although this RFA process is contestable and competitive, it differs from other more traditional procurement processes in that the Board is not looking to necessarily recommend that only one PSKH 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.
2. The competitive aspect of this process derives from the fact that funding available to establish PSKH's is likely to be limited. Therefore, the Board will be looking to recommend the best quality Applications to the Minister within the amount of funding available for the initial round of Applications. Further, another competitive aspect of this process will arise if two or more Applications are received which propose establishing a PSKH in broadly the same location (as this might impact upon whether the Board considers it is viable for two or more PSKH to be established in close proximity).



3. 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 PSKHs being proposed and the quality of the Applications received.

## 8 Guide to completing the Application

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1. When responding to this RFA, Applicants are required to submit the following information as part of their Application:
  - a completed Applicant Profile in the form set out in section two of Part Two of this RFA;
  - a section that responds to all of the questions under each of the requirements outlined in sections 3 to 6 of Part Two of this RFA;
  - a completed and signed Application Declaration in the form set out in section 9 of Part Two of this RFA;
  - 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 7 of Part Two of this RFA; and
  - a completed table of assumptions, risks, and caveats in the form set out in section 8 of Part Two of this RFA.
2. The information required under 1 must be presented in the following manner:
  - 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);
  - assumptions relating to information contained in an Excel worksheet must be included in a separate worksheet in that same document;
  - all text is to be in Arial font (or equivalent) in font size 10;
  - questions under each of the requirements outlined in sections 3 to 6 of Part Two of this RFA must be answered in the order they are provided in the RFA; and
  - each question under each of the requirements outlined in sections 3 to 6 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.
3. Please try and limit your application to no more than 100 pages in total.

## 9 Further Information for Applicants

This section provides details of contacts, further information and websites which you may find useful when preparing your PSKH applications

Subject	Website
The PSKH Working Group:	<a href="http://nzmcscs.education.govt.nz/">http://nzmcscs.education.govt.nz/</a> <a href="mailto:chair@partnerships.schools.education.govt.nz">chair@partnerships.schools.education.govt.nz</a>
<b>Ministry of Education</b>	
Ka Hikitia- Managing for Success	<a href="http://www.minedu.govt.nz/theMinistry/PolicyAndStrategy/KaHikitia.aspx">http://www.minedu.govt.nz/theMinistry/PolicyAndStrategy/KaHikitia.aspx</a>
Ka Hikitia – Measureable gains Framework	<a href="http://www.minedu.govt.nz/theMinistry/PolicyAndStrategy/KaHikitia/MeasuringandReportingProgress.aspx">http://www.minedu.govt.nz/theMinistry/PolicyAndStrategy/KaHikitia/MeasuringandReportingProgress.aspx</a>
New Zealand Curriculum	<a href="http://nzcurriculum.tki.org.nz">http://nzcurriculum.tki.org.nz</a>
Pasifika Education Plan 2013 – 2017	<a href="http://www.minedu.govt.nz/NZEducation/EducationPolicies/PasifikaEducation/PasifikaEducationPlan2013.aspx">http://www.minedu.govt.nz/NZEducation/EducationPolicies/PasifikaEducation/PasifikaEducationPlan2013.aspx</a>
Priority Learners	<a href="http://nzcurriculum.tki.org.nz/Priority-learners">http://nzcurriculum.tki.org.nz/Priority-learners</a>
Ruia: School – Whānau Partnerships for Māori Learners' Success	<a href="http://partnerships.ruia.educationalleaders.govt.nz/">http://partnerships.ruia.educationalleaders.govt.nz/</a>
Ruia: Teacher Appraisal for Māori Learners' Success	<a href="http://appraisal.ruia.educationalleaders.govt.nz/">http://appraisal.ruia.educationalleaders.govt.nz/</a>
Whakapumautia Papakowhaitia, Tau ana	<a href="http://tetahuhu.moe.govt.nz/policiesProcessesAndTools/RealisingMaoriPotential/Whakapumautia.aspx">http://tetahuhu.moe.govt.nz/policiesProcessesAndTools/RealisingMaoriPotential/Whakapumautia.aspx</a>
Success for All – Every School, Every Child:	<a href="http://www.minedu.govt.nz/NZEducation/EducationPolicies/SpecialEducation/OurWorkProgramme/SuccessForAll.aspx">http://www.minedu.govt.nz/NZEducation/EducationPolicies/SpecialEducation/OurWorkProgramme/SuccessForAll.aspx</a>
Stand-downs, suspensions, exclusions and expulsions guidelines	<a href="http://www.minedu.govt.nz/NZEducation/EducationPolicies/Schools/StanddownsSuspensionsExclusionsExpulsions.aspx">http://www.minedu.govt.nz/NZEducation/EducationPolicies/Schools/StanddownsSuspensionsExclusionsExpulsions.aspx</a>
Maori medium literacy strategy	<a href="http://www.minedu.govt.nz/~media/MinEdu/Files/EducationSectors/MaoriEducation/TeReoMatatiniEnglish.pdf">http://www.minedu.govt.nz/~media/MinEdu/Files/EducationSectors/MaoriEducation/TeReoMatatiniEnglish.pdf</a>
Te Marautanga o Aotearoa	<a href="http://tmoa.tki.org.nz">http://tmoa.tki.org.nz</a>
English medium assessment position (confirmed and available)	<a href="http://www.minedu.govt.nz/theMinistry/PublicationsAndResources/AssessmentPositionPaper.aspx">http://www.minedu.govt.nz/theMinistry/PublicationsAndResources/AssessmentPositionPaper.aspx</a>
Maori medium assessment position (draft)	<a href="http://tmoa.tki.org.nz/Mataiako/Aromatawai">http://tmoa.tki.org.nz/Mataiako/Aromatawai</a>
<b>Education Review Office</b>	
Priority Learners in New	<a href="http://www.ero.govt.nz/National-Reports/Evaluation-">http://www.ero.govt.nz/National-Reports/Evaluation-</a>



Zealand Schools	<a href="#">at-a-Glance-Priority-Learners-in-New-Zealand-Schools-August-2012</a>
Review processes	<a href="http://www.ero.govt.nz/Review-Process">http://www.ero.govt.nz/Review-Process</a>
<b>NZ Teachers Council</b>	
Registered Teacher Criteria	<a href="http://www.teacherscouncil.govt.nz/rtc/index.stm">http://www.teacherscouncil.govt.nz/rtc/index.stm</a>
Tātaiako: Cultural Competencies for Teachers of Māori Learners	<a href="http://www.teacherscouncil.govt.nz/required/tataiak_o.stm">http://www.teacherscouncil.govt.nz/required/tataiak_o.stm</a>
<b>Legislation</b>	
Education Amendment Bill 2012	<a href="http://www.minedu.govt.nz/theMinistry/EducationInNewZealand/EducationLegislation/EducationAmendmentBills/EducationAmendmentBill2012.aspx">http://www.minedu.govt.nz/theMinistry/EducationInNewZealand/EducationLegislation/EducationAmendmentBills/EducationAmendmentBill2012.aspx</a> <a href="http://www.parliament.nz/en-NZ/PB/Legislation/Bills/BillsDigests/e/c/7/50PLLaw20071-Education-Amendment-Bill-2012-Bills-Digest-No-2007.htm">http://www.parliament.nz/en-NZ/PB/Legislation/Bills/BillsDigests/e/c/7/50PLLaw20071-Education-Amendment-Bill-2012-Bills-Digest-No-2007.htm</a>

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## PART TWO – APPLICATION

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This section contains the Application that all Applicants must complete as your form of response. Applicants must follow the overarching instructions listed in Part 1 – Section 8 guide to completing the Application in addition to any specific instructions provided with any part of the Application.

**Notice to all Applicants**

The Education Amendment Bill sets out the legal framework for Partnership Schools | Kura Hourua and is currently being considered by the Education and Science Select Committee.

The Select Committee is due to report back to Parliament by 18 April 2013.

The application process for Partnership Schools | Kura Hourua is subject to the passage of the Education Amendment Bill through the House of Representatives

No contracts will be entered into until this Bill becomes law.

The Minister or Ministry of Education reserves the right to cancel this procurement process without notice or penalty, should the legislation be withdrawn or fail to be passed by Parliament.



# 1 Notice of Intent to Respond

Please copy this page into a new word document, complete and send to [partnership.schools@minedu.govt.nz](mailto:partnership.schools@minedu.govt.nz) by 5:00pm Friday 22<sup>nd</sup> March 2013.

The purpose of this notice is to advise the evaluators of your intent to respond to this RFA and the location you are considering proposing in your application. This section will not be evaluated, and provides the evaluators with an indication of the potential number of Applicant(s) to assist with our planning.

**NOTE:** Completing this section does not bind you to submitting an Application or limit you to the location which you have indicated your interest in operating a PSKH.

## Notice of Intent to Respond

**Attention:** Drew Preddy  
Procurement Manager, Partnership Schools  
C/- the Ministry of Education  
[partnership.schools@minedu.govt.nz](mailto:partnership.schools@minedu.govt.nz)

This notification confirms that our organisation intends to submit a formal response to the RFA for operation of a Partnership School dated 6<sup>th</sup> March 2013. We acknowledge the terms and conditions of this RFA and that our Application must be received before the Closing Date (12:00 noon 16 April 2013).

Notification:	Dated	
Respondent:	Organisation	
	Address	
Primary Contact:	Name	
	Position	
	DDI	
	Mobile	
	Email	
	Signed	

Our intention is to submit an Application in consideration of operating a PSKH in the following location [add detail].

## 2 APPLICANT PROFILE

1. Contact person for this Application				
Contact person:				
Position:				
Phone number:				
Mobile number:				
Email address:				
Fax number:				
Is the contact person authorised to negotiate?	Yes		No	

2. Applicant's organisational profile	
Full legal name:	
Trading name: (if different)	if applicable
Name of parent organisation:	if applicable
Physical address:	for company insert registered office
Postal address:	
Company website:	If applicable
Location of head office:	city in New Zealand
Type of entity (legal status):	sole trader / partnership / limited liability company / charitable trust / consortium / other please specify
Company registration #:	if applicable, registered number for a company
Country of residence:	insert country where organisation is resident for tax purposes
GST registration number:	NZ GST number (if applicable)

3. 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 this RFA:	
Total number of staff in NZ:	
Number of locations in NZ:	



Overseas locations:	state any other country where organisation has an operational presence
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#### 4. Current business commitments & proposed key personnel

Business commitments:	List organisation's current business 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.

#### 5. Probity

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

#### 6. Disclosure of proposed partners

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.
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##### Collaborative Partner / Sub-contractor #1

Partner / Sub-contractor name:	
Address:	
Specialisation:	
Describe the deliverables the Partner / sub-contractor will be responsible for:	

##### Collaborative Partner / Sub-contractor #2

Partner / Sub-contractor name:	
Address:	
Specialisation:	
Describe the deliverables the Partner / sub-contractor will be responsible for:	

Copy and add more rows as required



7. 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			
Gross profit:	state the gross profit for the last two years			
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	

8. Quality standards	
Certificates held:	list any ISO or AS/NZ certificates held
Quality assurance systems:	list any QA systems / software / standards in operation
Internal audit:	list any internal audit systems / software / standards in operation
Contract management:	list any contract management systems / software / standards in operation
Monitoring & evaluation:	list any M&E systems / software / standards in operation
Reporting:	list any reporting systems / software / standards in operation
Financial management:	list any financial management systems / software / standards in operation
Risk management:	list any risk management systems / software / standards in operation
Records management:	list any records management systems / software / standards in operation
Staff training:	list routine staff training supplied
Codes of conduct	list any codes of conduct which apply to the organisation / staff

9. Occupational Health & Safety (OHS)				
<b>Health &amp; Safety Management:</b>				
Do you have a written health & safety policy?	Yes		No	
Do you have an employee participation scheme for dealing with health & safety issues?	Yes		No	
Is formal health and safety training given to employees?	Yes		No	
<b>Records:</b> Which of the following safety records do you maintain?				
- Accident Register (as required by Health & Safety Act)?	Yes		No	
- Hazard Register?	Yes		No	

- Hazard information?	Yes		No	
<b>History:</b> Have you received health and safety award/s?	Yes		No	
If yes provide details:				
Have you had health and safety related notice/warning/fine/prosecution?	Yes		No	
If yes provide details:				
<b>Health &amp; safety procedures:</b>				
Do you have an emergency procedures plan?	Yes		No	
Are formal hazard assessments carried out and recorded?	Yes		No	
Is there always an investigation into any accident that results in harm, or could have resulted in harm?	Yes		No	
Are vehicles and equipment regularly inspected, tested, examined and maintained?	Yes		No	

#### 10. Referees

Please supply the details of three referees who have relevance to your Application to operate a PSKH. Include a summary of the nature of the relationship they have held with you and when. Please do not provide the Ministry of Education or any of its employees as referees.

Referee #1	
Name of organisation:	
Name of referee:	
Address:	
Telephone:	
Email:	
Relationship:	summarise the nature of the relationship with this referee
when:	state the dates that this relationship covers

Referee #3	
Name of organisation:	
Name of referee:	
Address:	
Telephone:	
Email:	
Relationship:	summarise the nature of the relationship with this referee
when:	state the dates that this relationship covers



Referee #3	
Name of organisation:	
Name of referee:	
Address:	
Telephone:	
Email:	
Relationship:	summarise the nature of the relationship with this referee
when:	state the dates that this relationship covers



### 3 PURPOSE AND GOALS

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The statement of Purpose and Goals should act as your executive summary and describe why you want to establish your particular PSKH in this area, its distinctive purpose and how it will support student achievement. The statement of Purpose and Goals should be reflected through all sections of your application and later sections must demonstrate that it is both deliverable and affordable.

#### 3.1 Objective

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The Statement of Purpose and Goals is the driving force behind all other components of the application. It should clearly convey that all elements of the school's educational business and operational plans are in alignment and all outcomes are linked to your Statement of Purpose and Goals.

Performance goals need to reflect how the school will contribute to the relevant targets developed by the Ministry of Education in response to the Government's Better Public Service goals for education. That is (for example):

1. Increase the proportion of learners achieving literacy and numeracy standards;
2. 80% of schools will be demonstrating highly inclusive practices for learners with special education needs with 20% demonstrating good practice; and
3. 85% of learners achieving NCEA Level 2 by 2017.

Successful Applicants will also demonstrate that they have the desired cultural capability to work in ways that value and validate the identities, languages and cultures of the priority groups. And that they remain committed to further developing this capability to ensure it becomes the foundation by which they become highly effective in the delivery of the contracted outcomes.

#### 3.2 Questions

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1. Provide a detailed statement of purpose and goals that:
  - a) describes your distinctive mission/vision and detail how it will enable student engagement and achievement and why you are proposing to open this school;
  - b) defines the school's performance goals and detail how these will be achieved and measured; and
  - c) outlines what you believe to be the key advantages of your application and how they will meet or exceed the outcomes described in 1(b) above.

#### 3.3 Response

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Provide your response to the questions in the same order and using the exact same numbering sequence. i.e. Section 3, Question 1.

## 4 EDUCATIONAL PLAN

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### 4.1 EDUCATIONAL FOCUS

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#### 4.1.1 Objective:

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The Educational Plan is the heart of your application. It must show how each element serves to reflect the school's purpose and allows performance goals to be met.

The plan must describe the structure of your school and the experience that students will have there. It must also show how the school intends to evaluate the performance of both individual learners and the school as a whole.

Your target student population must be clearly identified and plans for engaging with the Government's priority groups and parents, family/whānau and community are clearly identified and achievable.

The school's learning environment and teaching practices will be designed to match the educational needs of the proposed student population and lead to success for the Government's priority groups. The school self review processes should be linked to, and reflective of, best practice and ensure ongoing development and improvement.

Reviewers will expect that the proposed approach to monitoring student progress and achievement will align with the school's stated purpose and goals.

#### 4.1.2 Questions:

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##### Part A - Proposed student population and educational need

1. Provide a profile of the student population you expect at your school e.g. year level, ethnicity, gender, roll numbers.
2. Provide detail on the following:
  - a) the relationship between the student population to be served and the intended geographic location of the school;
  - b) how the school will be able to provide improved outcomes for Māori, Pasifika, students with special education needs and students from low socio-economic backgrounds when compared with current provision in the area served by the school;
  - c) describe the educational needs of students the school intends to enrol and identify the barriers that exist between them and educational achievement; and
  - d) how you propose to attract these students.

##### Part B - Curriculum

3. Describe
  - a) the curriculum that your school will use. If this is not the New Zealand Curriculum (NZC) or Te Marautanga o Aotearoa (TMOA) please explain why you chose this curriculum, explain how it aligns with the key elements of one of these documents and provide details of the curriculum by way of appendix; and
  - b) detail how your chosen curriculum will be delivered at each year level in your proposed school.
4. Set out the rationale for your chosen curriculum and demonstrate how it will meet the needs of the proposed student population, whilst having an ambitious approach to meeting those needs.