

## **Education Report: Confirming Round Two of Applications to Operate Partnership Schools**

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### **Executive Summary**

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We seek your approval to commence the second application round (round two) for sponsors who wish to operate a Partnership School. This round is for schools opening in February 2015. We ask you to agree to release the Request for Application (RFA) on the Government Electronic Tenders Service (GETS) on 28 November 2013 and to note the timeline for this round.

Cabinet noted that you intend to give specific directions about the types of schools and other factors that will be given preference in determining successful applications in round two. The five preference factors were schools that:

- cater for primary-aged children
- make effective use of the flexibilities offered by the model, rather than existing schools seeking to maximise their funding
- are large enough to be comfortably viable
- are in areas of roll growth
- demonstrate a strong case for the location in relation to priority student demographics and areas where students are not being well-served by the education system.

We ask you to confirm that round two should take account of these five preference factors. ✓

The Partnership School's Authorisation Board and the Ministry of Education are working on an updated version of the Request for Application (RFA) form that builds on lessons learnt from round one and reflects the preference factors. A draft of this form will be provided to you for feedback by 22 November 2013.

The Authorisation Board and the Ministry are developing an evaluation process that will enable high quality proposals to be identified and considered, while ensuring decisions are steered by the preference factors.

We are continuing work to refine the Authorisation Board's terms of reference. Their involvement in the Request for Application process is consistent with their statutory responsibilities and their existing terms of reference which will apply until you sign off any revised version.

Recommended Actions

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We recommend that you:

- a. **agree** to commence the second application round to operate a Partnership School

AGREE/DISAGREE

- b. **note** that these Partnership Kura will open in February 2015

- c. **agree** that the Request for Application (RFA) will be released on the Government Electronic Tenders Service (GETS) on 28 November 2013

AGREE/DISAGREE

- d. **note** the timeline for round two in paragraph 3 of this report

- e. **note** that you advised Cabinet of your intention to give specific directions about the factors that would be given preference in determining successful applications in round two

- f. **confirm** that round two will take account of the following preference factors:

- schools that cater for primary-aged children

AGREE/DISAGREE

- schools that will make effective use of the flexibilities offered by the model, while ensuring existing schools are not applying to be a Partnership Kura as a way to maximise their funding

AGREE/DISAGREE

- schools that are large enough to be comfortably viable

AGREE/DISAGREE

- schools that are in areas of roll growth

AGREE/DISAGREE

- schools that can demonstrate a strong case for their location in relation to priority student demographics and areas where students are not being well-served by the education system

AGREE/DISAGREE

- g. **note** that the Authorisation Board and the Ministry are working on an updated version of the Request for Application (RFA) form, and a draft will be provided to you for feedback by 22 November

*innovative models around consistent provision for 0-8 year olds (ref research on brain dupst)*

- h. **note** that the Authorisation Board and the Ministry of Education are developing an evaluation approach that enables high quality proposals to be identified and considered, while ensuring decisions are steered by the preference factors

- i. **note** that the Authorisation Board's involvement in the Request for Application process is consistent with their statutory responsibilities and their existing terms of reference, which will apply until you sign off any revised version.



Karl Le Quesne  
Acting Deputy Secretary  
Student Achievement

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Hon Hekia Parata  
Minister of Education

16/11/13

## Education Report: Confirming Round Two of Applications to Operate Partnership Kura

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### Purpose of Report

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1. The purpose of this report is to seek your agreement to:
  - commence the second application round (round two) to operate a Partnership Kura
  - carry out round two taking account of five preference factors.
  
2. You are also asked to note the proposed timeline for round two, and the work that is underway on both an updated Request for Application (RFA) form and a revised evaluation process.

### Round Two Timeline

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3. Below is the proposed timeline for round two. This is subject to funding being secured through Budget 2014.

Action	Start Date	Finish Date	Responsibility
RFA in market	28 November 2013	11 March 2014	Ministry
Sponsor briefings	9 December 2013	13 December 2013	Authorisation Board
Update to Minister	12 March 2014	14 March 2014	Ministry
Initial evaluation of applications <ul style="list-style-type: none"> <li>• commercial evaluation</li> <li>• financial viability checks</li> <li>• moderation session #1</li> </ul>	12 March 2014	8 April 2014	Authorisation Board and Ministry
Authorisation Board and Ministry meeting	9 April 2014	9 April 2014	Authorisation Board and Ministry
Issue clarifications to applicants and receive responses	10 April 2014	17 April 2014	Authorisation Board and Ministry
Consider clarification responses <ul style="list-style-type: none"> <li>• moderation session #2</li> </ul>	18 April 2014	23 April 2014	Authorisation Board and Ministry
Authorisation Board and Ministry meeting – Determine Shortlist	24 April 2014	24 April 2014	Authorisation Board and Ministry
Report to Minister	25 April 2014	5 May 2014	Ministry

Shortlist applicant interviews • reference checks • site visits (optional)	28 April 2014	16 May 2014	Authorisation Board and Ministry
Authorisation Board and Ministry meeting	19 May 2014	20 May 2014	Authorisation Board and Ministry
Drafting recommendations to Minister	21 May 2014	27 May 2014	Authorisation Board and Ministry
Recommendations to the Minister for decision-making	28 May 2014	28 May 2014	Authorisation Board and Ministry

4. Once you have decided which sponsors to approve, applicants will be informed of the outcome of their applications.

#### Preference Factors

5. Cabinet noted that you intend to give specific directions about the types of schools and other factors that will be given preference in determining successful applications in the next application round. This will help to mitigate risks relating to:
- the impact of Partnership Kura on the schooling network
  - potential inconsistencies between the size of Partnership Kura and practices for state schools
  - the financial implications of approving more Partnership Kura.
6. You outlined five preference factors to Cabinet that you would consider for inclusion. The Ministry is now seeking your approval for round two to be carried out in accordance with these five factors.

Preference Factor	Rationale
Schools that cater for primary-age children	Early intervention is one of the most effective ways to raise student achievement. It enables students who are falling behind to get the help they need to progress and achieve as early as possible. It also enables behaviour and attendance issues to be addressed before they escalate.
Schools that will make effective use of the flexibilities offered by the model, while ensuring existing schools are not applying to be a Partnership Kura as a way to maximise their funding.	The intention of the Partnership Kura initiative is to add value to the network by providing an additional schooling option that makes a significant difference for priority learners, rather than incorporating an existing school that may already be offering value.
While applications from private schools will not be ruled out, they will not be a priority.	

Schools that are large enough to be comfortably viable	It is vital to set up Partnership Kura that are financially viable. There are benefits of scale for students including broader curriculum options and greater teaching specialisation. It also enables schools to deliver more of the core curriculum themselves at senior levels rather than relying on external parties.
Schools that are in areas of roll growth	Extra provision is needed in these areas. It also increases the diversity of schooling options available.
Schools that can demonstrate a strong case for their location in relation to priority student demographics and areas where students are not being well-served by the education system	This enables potential sponsors to use demographics and student achievement information around priority learners to demonstrate the need for a Partnership Kura in a particular location.

7. These preference factors will steer the decisions about which schools are selected. They will not prevent the selection of an outstanding proposal that does not fit within these factors.

#### Request for Application Form

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8. The Authorisation Board and the Ministry are working together on an updated version of the Request for Application (RFA) form. This process is building on the lessons learned from round one.
9. Although the form is still under development, it is intended that the preference factors will be clearly stated at the front of the form under a section covering 'what we want'. The form will also provide more explicit information to potential sponsors including a copy of the contract and updated performance management information. This will help to ensure applicants are clear about what is expected of them if they are successful.
10. The Authorisation Board and the Ministry propose releasing the Request for Application (RFA) on the Government Electronic Tenders Service (GETS) on 28 November 2013. A copy of the draft will be provided to you for feedback by 22 November.
11. The Authorisation Board and the Ministry propose that the RFA is in the market for 16 weeks. This is a longer period than for round one, and will help to encourage potential sponsors to develop high quality applications that include relationships and/or partnerships that will add value to their proposal.

#### Evaluation of Applications

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12. The Authorisation Board and the Ministry are also working together to develop an evaluation approach that enables high quality proposals to be identified and considered, while ensuring decisions are steered by the preference factors.
13. The Authorisation Board advises that it respects the intentions of the Minister in including the preference factors in round two. The Authorisation Board is

considering how the evaluation process can be structured to balance their objective of identifying and promoting the best applications whilst ensuring that the preferences of the Minister are maintained.

14. We will provide further information on the proposed evaluation process along with the draft RFA.

#### Authorisation Board Terms of Reference

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15. We are continuing work to refine the Authorisation Board's terms of reference. Their involvement in the Request for Application process is consistent with their statutory responsibilities and their existing terms of reference, which will apply until you sign off any revised version.