

Applications for Sponsors of Charter Schools | Kura Hourua

Information about the processes, timelines and decisions

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1. Application process

- Applications went live GETS on 11 July 2024 for stage one.
- Negotiations have begun for seven sponsors approved for contracting to open schools in February 2025.
- A smaller number of sponsors have been approved for contracting to open schools by February 2026 (negotiations to begin in 2025).
- Approved sponsors were selected via a two-stage application process between July-November:
 - **Stage one** was open to all and established the suitability of potential sponsors and the viability of the proposed school.
 - **Stage two** was open to invited sponsors from stage one and laid out their plans to establish and operate a school, in part considering the condensed establishment timeline.
- With limited funding and many applications received, there was a high threshold for a potential sponsor to be approved for contracting.





2. Timeline

February 2025 August 2024 June 2024 July 2024 September 2024 October 2024 **November 2024** Dec 2024 - Jan 2025 onwards AB undertakes Recommendations Applications open for Applications close for Applications close for interviews for highly **Contracted sponsors** The first schools open EaTA Amendment Bill communicated to tabled in parliament viable applicants to begin establishment stage one stage two in Term One stage one applicants interrogate readiness ERO and MoE provide All applicants receive Contracting continues Establishment Applications assessed Applications open for their views, if any, to notification of AB for later starting continues for later by CSA stage two the AB. decisions sponsors starting sponsors Successful applicants Bill passes and AB commences Converting schools EB independently Applications assessed receives royal assent, begin contracting begin contracting and consultation for reviews applications by CSA AB is legislated converting schools establishment process Schools have been approved to open across 2025 and 2026 managed within Recommendations of AB reviews and Key AB independently and the budget envelope. CSA provided to EB to adopts all CSA **EaTA** - Education and Training Act concurrently reviews support application recommendations **EB** - Establishment Board applications review and processes **AB** - Authorisation Board CSA - Charter School Agency **ERO -** Education Review Office Recommendations of MoE - Ministry of Education CSA provided to AB to Charter School **Charter School** support application **Authorisation Board** review

3. Assessment criteria

Stage one

Stage two

Legislation

1. Pre-conditions

- Fit and proper person's test
- Secondary qualification system

- 2. Purpose statement
- Motivation and interest
- Aspirations
- Education strategy
- Supporting parental choice and innovation
- Opportunity for students

- 3. High-level business plan
- Student achievement
- Student demographic and attendance
- Financial sustainability
- Workforce planning
- Context and environment
- Physical and cultural assets

1. Sponsor capability

- Financial acuity
- Leadership and community

2. Contribution to the wider school network

- Student impact
- Opportunities for whānau

3. Operational fitness

- Readiness to open
- Performance and longevity

Considerations of the Authorisation Board

- The focus of the proposed school.
- The capability of the sponsor.
- The financial implications for the Crown.
- If it meets educational purpose of the Education and Training Act 2020.
- The level of support from the community.
- The views of the Chief Review Officer and the Secretary for Education.
- Additional considerations for converting schools (performance, and support of/for).





4. Assessment ratings

Selection of applicants to progress to stage two considered:

- Demonstration of being a fit and proper organisation/person as outlined in the Education and Training Amendment Act.
- Use of a nationally or internationally recognised secondary qualification system.
- Individual weighted assessment rating.

(1) Not Viable

• If you receive a "1" in any criteria, the CSA will consider if your application should be removed from the process.

(4) Potentially Viabl

• If you receive a "4" in any criteria, the CSA will consider your application, but you are not guaranteed progression to stage two.

(7) Viable

 If you receive a "7" in all your criteria, your application will automatically progress to stage two. Following stage two, the Authorisation Board considered the recommended ratings of the assessment panel against the criteria:

Not Viable

 If you receive a "Not viable" in any criteria, your application may be recommended to the Authorisation Board to be Declined.

Viable

 If you receive a "Viable" in all criteria, your application will be recommended to the Authorisation Board to be Approved.

In using the ratings and exercising their judgement, the Authorisation Board considered the responses in relation to the considerations referenced in the Act and that financial obligations to the Crown could be met.





5. Role of the Charter School Agency



Contract sponsors

- Manage application process to contract outcomes
- Fund schools on behalf of the Crown within budgets



Monitor and report on outcomes

- Contractual and legislative obligations
- Performance plan



Provide advice

- To the Authorisation Board
- To Ministers
- Work with statutory bodies



Secretariat for the Authorisation Board

- Recommendations
- Operational support





6. Role of the Authorisation Board



Decide on applications

- Consider applications
- Approve schools to negotiate contracts
- Apply conditions to their approval



Oversee performance of charter schools

- Receive monitoring and reporting
- Determine if sponsors are meeting their contract terms



Provide advice to the Minister

- Operation of the charter school model
- Advice or oversight as requested by the Minister



Decide on interventions

- Whether to apply interventions
- Determine level of interventions





7. Lessons to learn from

The Charter School Agency has completed an initial high-level review of the 2024 application process, and has identified the following key lessons to inform planning for further rounds:

Process for new and converting schools

New and converting schools have different application requirements.

They will have separate processes with tailored steps and information.

Timeframes for conversions

Converting schools need sufficient time to consider their options.

There will be multiple entry points into the process through light-touch Expressions of Interest.

Support during application period

Converting schools need to undertake consultation with their community during their application.

Support will be offered and will be concurrent to other activities to be efficient with time.* Written application requirement

Written information could be reduced to mitigate overload of information for all.

Written detail will focus on core requirements supplemented by details in presentations and interviews. Interviews for applicants

Interviews with the Authorisation Board will be undertaken for shortlisted applicants.

Interviews will be built into timeframes early in the process after longlisting.

Establishment period for schools

Sponsors need more establishment time after contracting concludes.

A minimum of one school term will be built into timeframes for establishment activities.**





^{*}Such as Board consultation obligations, gathering views of Secretary for Education and the Chief Review Officer, application process activities

^{**}Such as employment and property matters, organising supply contracts