



**Charter School
Agency**

Application Form for Stage One Sponsors of Charter Schools | Kura Hourua

RESPONSE FORM

Application Opens: 11 July 2024
Applicant Briefing: 3:30pm 18 July 2024
Deadline for Questions: 12:00pm, (midday), 31 July 2024
Deadline for Applications: 12:00pm, (midday), 9 August 2024



Response pack instructions

The following instructions explain the format of the response pack, and your requirements for completing it.

General information

Part one is all the general administrative information we need:

- i. Point of contact
- ii. Business information
- iii. Charter schools | kura hourua Information.

Please check this section carefully and ensure adherence to each aspect.

Pre-condition – Fit and proper persons test

In part two, please respond to the questions and, if required, ensure that you provide all requested information in your response.

Written response

Sections within part three below are for you to respond in relation to:

- a) Testing viability and leadership;
- b) Your high-level business plan.

Please use the prompts in the document to frame your answers. When you hover over the text, it will highlight the box for editing where you can directly type over the current text.

Declaration

In part four, please read and make sure you understand the declaration and then sign.

Further information

Further information about the Charter schools | kura hourua can be reviewed here - www.charterschools.govt.nz

Response form

Part one: General information

Applicant point of contact	Detail
Contact person:	Name of the person responsible for communicating with the Charter School Agency and the Ministry of Education
Position:	Job title or position
Phone number:	Landline
Mobile number:	Mobile
Email address:	Work email

Applicant business information	Detail
Trading name:	Name that you do business under
Full legal name (if different):	If applicable
Physical address:	If more than one office put the address of your head office
Postal address:	E.g., P.O.Box address
Registered office:	If you have a registered office insert the address here
Business website:	URL address
Type of entity (legal status):	Body corporate, corporation sole, limited partnership, institution, or related entity
Company Number:	Companies Register number
New Zealand Business Number (NZBN):	NZBN if you have one
GST registration number:	NZ GST number

Charter School Kura Hourua information	Detail
Proposed setting or focus:	The focus/setting of your proposed school
Proposed name:	Name of proposed charter school
Proposed location:	Physical address of proposed school

Type of school:	Is this a new / converting school?
Proposed roll size and type:	Will it be single-sex or co-educational, what year levels will it offer, what is its language of instruction? Include projected roll (by year and year level) for the first 3 years of operation
Proposed opening term (noting that the priority is for schools to open for Term 1 2025):	Term 1/Term 2/Term 3/Term 4 2025 OR Term 1 2026

Part two: Pre-conditions

Pre-condition	Confirmation of meeting pre-condition
Pass/fail to progress to assessment stage	
<p>Fit and proper person test</p> <p>The sponsor and all known governing members (and future governing members as they become known) must show that they are a fit and proper organisation/person as outlined in the draft legislation amendment to the Education and Training Act 2020 (applicable to all individuals in the applying organisation) before their full application can be assessed.</p>	<p>Completed and signed statutory declaration for the sponsor of this application submission has been provided.</p> <p>Yes / No</p> <p>Individual completed and signed statutory declarations for all known governing members at the time of this application submission have been provided.</p> <p>Yes / No</p> <p>Prior to the appointment of future governing members, individual completed and signed statutory declarations will be provided to the agency without delay.</p> <p>Yes / No</p>
<p>Proposed secondary qualification system</p> <p>Must be internationally or nationally recognised.</p>	<p>Yes / No</p> <p>State your qualifications system.</p>

Part two: Statutory declaration form – Fit and proper persons test

See forms for completion on the following pages:

- a) Form A. Sponsor declaration – complete one declaration per application
- b) Form B. Governing members declaration – complete individual declarations for all governing members

Form A. Sponsor statutory declaration form

To be completed by the person/role with authority to sign the declaration on behalf of the sponsor entity.

I full name

of address

being the applicant for name of proposed charter school | kura hourua

in my capacity as role in relation to school – e.g., chief executive, director

understand that the following information is required for the purpose of enabling the Charter School Agency to determine whether the sponsor is suitable to operate a charter school | kura hourua. This information is required as outlined in the draft legislation to amend the Education and Training Act 2020 to enable the establishment of the charter schools | kura hourua model.

Where I have answered in the affirmative to any of the following points, I have attached all the relevant details in relation to the matter.

I solemnly and sincerely declare that all my answers to the following questions are true and correct.

Conviction history	Has the proposed sponsor ever been convicted of any offence involving fraud or any crime involving dishonesty?	Yes / No	<i>If yes, please provide details of the offence and/or crime.</i>
Financial obligations to the Crown	Does the proposed sponsor currently owe, or have they previously owed money to the Crown including in respect of bodies the sponsor has been involved in managing?	Yes / No	<i>If yes, can you provide details such as a statement of your financial obligations and status with the Crown?</i>
Interventions in other charter schools	Has an intervention ever been applied in relation to another charter school which is or was operated by the proposed sponsor?	Yes / No	<i>If yes, what were the circumstances and outcomes of such interventions?</i>
Breaches of statutory duties	Has the proposed sponsor committed a serious or repeated breach of their statutory duties in relation to a charter school?	Yes / No	<i>If yes, can you provide details of any such breaches and measures taken to address them?</i>
Other relevant matters	Are there any other factors or concerns that should be considered in assessing the proposed sponsor's fitness and propriety?	Yes / No	<i>If yes, please detail what these factors or concerns are and how you would address them.</i>

DECLARATION

I make this solemn declaration conscientiously believing the same to be true and by virtue of the Oaths and Declarations Act 1957.

Sponsor signature:	sponsor signature
Declared at:	place
Official witness name	name of witness
Official witness signature	signature of witness who is a person authorised to take a statutory declaration
Date:	date

Form B. Governing members' statutory declaration form

To be completed by all persons who are governing members of the proposed sponsor.

I full name

of address

being a governing member for name of proposed charter school | kura hourua

in my capacity as role in relation to school – e.g., board, director

understand that the following information is required for the purpose of enabling the Charter School Agency to determine whether the governing member is suitable to be involved in the management and operation of the proposed charter school | kura hourua. This information is required as outlined in the draft legislation to amend the Education and Training Act 2020 to enable the establishment of the charter schools | kura hourua model.

Where I have answered in the affirmative to any of the following points, I have attached all the relevant details in relation to the matter.

I solemnly and sincerely declare that all my answers to the following questions are true and correct.

Serious criminal activity	Has the governing member been convicted of serious criminal activity which is defined in section 10(1) as “serious criminal activity means any offence involving fraud, violence, or harm to children, any sexual offence, or any crime involving dishonesty”.	Yes / No	<i>If yes, please provide details of the serious criminal activity.</i>
Bankruptcy and director/promoter prohibitions	Has the governing member been <ul style="list-style-type: none">• adjudicated bankrupt under the Insolvency Act 2006?• prohibited from being a director or promoter of, or being concerned or taking part in the management of,<ul style="list-style-type: none">○ a company under the Companies Act 1993 or○ any other body corporate?	Yes / No	<i>If yes, can you provide details such as bankruptcy records or declarations regarding prohibitions?</i>
Interventions in other charter schools	Has an intervention been applied in relation to another charter school of which the person is or was a governing member of the sponsor?	Yes / No	<i>If yes, what were the circumstances and outcomes of such interventions?</i>
Breaches of statutory duties	Has the person committed a serious or repeated breach of their statutory duties as a governing member of the sponsor?	Yes / No	<i>If yes, can you provide details of any such breaches and measures taken to address them?</i>

Other relevant matters	Are there any other factors or concerns that should be considered in assessing the governing member's fitness and propriety?	Yes / No	<i>If yes, please detail what these factors or concerns are and how you would address them.</i>
DECLARATION			
I make this solemn declaration conscientiously believing the same to be true and by virtue of the Oaths and Declarations Act 1957.			
Governing member signature:	governing member signature		
Declared at:	place		
Official witness name	name of witness		
Official witness signature	signature of witness who is a person authorised to take a statutory declaration		
Date:	date		

Part three: Written responses

The following section includes two areas in which you are being asked to provide information to enable analysis, recommendations and decisions by the Charter School Agency and independent Charter Schools Authorisation Board (and any other stakeholder deemed appropriate in completing a satisfactory assessment of the application).

The two areas include:

a. Testing viability and leadership

b. Business plan

Testing viability and leadership

Weighting

30%

Include a purpose statement below that describes and makes clear what your interest and aspirations are in sponsoring a charter school | kura hourua and what your approach to operating the school will be?

In submitting your purpose statement, you should address the following questions (please feel free to include more information beyond these):

Your motivation and interest

- a) What is your vision for education at your school and how does it relate to supporting young people?
- b) What motivates you to establish this school as sponsor?

Your aspirations

- c) What are your aspirations for the proposed school | kura hourua?
- d) Why is this important for the community (including communities of interest)?

Education strategy

- e) What are the key educational features of your proposed charter school | kura hourua?
- f) How will these features enhance the learning experience of students?

Supporting parental choice and innovation

- g) How will this support parental choice or enhance the learning opportunity for students?
- h) How does the model show innovation and what benefits does it provide to the community of the proposed school?

Opportunity for students

- i) How does your model provide opportunities for all students in the proposed school's community (including communities of interest)?

answer points a-i

Your High-Level Business Plan

Weighting

70%

Outline at a high level the overall business plan for establishing and operating the proposed charter school | kura hourua. The business plan should support and convey the proposed charter school's | kura hourua's focus on academic achievement and attendance. The business plan will need to include:

Student achievement

- a) What is your strategy to raise academic achievement and how will this benefit the students at the proposed charter school | kura hourua?
- b) Outline strategies for addressing academic underperformance.

Student demographics and attendance

- c) Who will the school offer this new opportunity to and who are the students?
- d) What is your strategy to uplift the student attendance and how will you measure this?
- e) Detail attendance improvement programmes and initiatives.

Financial sustainability

- f) Present a budget for the first few years of operation that shows at a high level expected revenue vs expected costs.
- g) Explain how funds will be allocated to various operational needs.
- h) Describe strategies to ensure long-term financial sustainability, including plans for financial oversight and accountability.

Workforce planning

- i) What is the governance structure and ethos for the school (including relationship with existing governance for the organisation or school)?
- j) What is the leadership structure planned for the school? This needs to show the academic leadership as well as how the organisation capabilities such as finance, HR, payroll and information management fit in to ensure ongoing governance and operations.
- k) Estimate the number and types of staff required (e.g., registered teachers, Limited Authority to Teach (LAT), administrative staff).
- l) Highlight qualifications and experience needed for key positions.
- m) Outline recruitment strategies to attract high-quality staff.
- n) Describe retention programmes and professional development opportunities.

Context and environment

- o) What is the level of support for the proposed charter school?
- p) How do you plan to engage with the local community and stakeholders in the development and operation of the school?
- q) Present data on current and forecasted student population and highlight the demand for the proposed charter school | kura hourua.
- r) Discuss the potential long-term impact on educational outcomes and the wider community.
- s) Include any anticipated changes or trends in the local education landscape.

Physical and cultural assets (answer as applicable).

The below are types of assets you may require in your school but are not an exhaustive or prescriptive list. Please use these pointers as examples, or a starting point but adapt to suit the needs of your school.

- t) Infrastructure and facilities **[new schools only]:**
 - a. List the physical assets required (e.g., buildings, classrooms, sports facilities).
 - b. Outline the plan for acquiring, developing, or leasing these assets.
- u) Technological resources **[new schools only]:**
 - c. Detail the equipment and infrastructure needed for online and blended learning environments.
 - d. Discuss plans for ensuring all students have access to necessary technology and, if applicable, still meeting necessary supervision requirements.
- v) Cultural approaches **[all schools]:**
 - e. Describe any cultural assets or approaches integral to the learning environment.
 - f. Explain how cultural values and practices will be incorporated into the school's ethos and curriculum.

answer points a-s, and t-v as applicable

Part four: Application declaration

Applicant's declaration		
Topic	Declaration	Applicant's declaration
Application process, terms and conditions	I/we have read and fully understand this application, including the process, terms and conditions. I/we confirm that the applicant/s agree to be bound by them.	agree / disagree
Collection of further information	<p>The applicant/s authorises the Charter School Agency and the Ministry of Education to:</p> <ul style="list-style-type: none"> a. collect any information about the sponsor, except commercially sensitive pricing information, from any relevant third party, including a referee; b. use such information in the assessment of this application. <p>The applicant/s agrees that all such information will be confidential to the Charter School Agency and the Ministry of Education.</p>	agree / disagree
Use of information	The applicant/s agree that information provided as a part of the fit and proper persons test can be shared with appropriate third parties engaged to undertake the necessary reviews.	agree / disagree
Conflict of interest declaration	The applicant warrants that it has no actual, potential or perceived conflict of interest in submitting this application or entering into a contract to deliver the requirements. Where a conflict of interest arises during the application process, the applicant/s will report it immediately to the Charter School Agency and the Ministry of Education's point of contact.	agree / disagree
<p>Details of conflict of interest: if you think you may have a conflict of interest briefly describe the conflict and how you propose to manage it or write 'not applicable'</p>		
<p>DECLARATION</p> <p>I/we declare that in submitting the application and this declaration:</p> <ul style="list-style-type: none"> a. the information provided is true, accurate and complete and not misleading in any material respect; b. the application does not contain intellectual property that will breach a third party's rights; c. I/we have secured all appropriate authorisations to submit this application, to make the statements and to provide the information in the application and I/we am/are not aware of any impediments to enter into a contract to sponsor a charter school kura hourua. <p>I/we understand that the falsification of information, supplying misleading information or the suppression of material information in this declaration and the application may result in the application being eliminated from further participation in the application process and may be grounds for termination of any contract awarded as a result of the application process.</p> <p>By signing this declaration, the signatory below represents, warrants and agrees that he/she has been authorised by the applicant/s to make this declaration on its/their behalf.</p>		
Signature:	signature of authority on behalf of sponsor	

Full name:	name of authority on behalf of sponsor
Title / position:	title of authority on behalf of sponsor
Name of organisation:	name of
Date:	date



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Visit www.charterschools.govt.nz for more information