



## About Charter Schools | Kura Hourua

Congratulations on advancing to stage two of the charter school application process.

During this stage, we will be assessing operational fitness and capability, and your school's likely contribution to the wider school network.

We look forward to working closely with you to ensure that your vision for a charter school aligns with the commitment to lift educational outcomes for tamariki and rangatahi.

Nāku Noa, Nā  
Jane Lee, Chief Executive



This document **Application Overview** is part 1 of 5 application documents. Please make sure that you read all documentation provided including the additional appendixes.

## Application key dates

Milestone	Date
Open date	11 September 2024
Briefing	3:30pm   17 September 2024
Deadline for questions	Midday   4 October 2024
Close date	Midday   11 October 2024

Applications must be submitted **through GETS** by the close time and date specified above.

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The operator of a Charter School (known as a sponsor) can either set up a new Charter School or support the conversion of an existing state or state-integrated school to a Charter School under certain conditions (excluding specialist schools).

Charter Schools will have greater flexibility in teaching, curriculum, governance, hours and days of operation, and funding. In turn they will achieve greater innovation in learning and increase choice for students and parents. In exchange for greater flexibility, they are subject to increased oversight and accountability.

Enrolment in a Charter School will be free except for international students. Charter Schools must accept all eligible applications to enrol unless they are oversubscribed. Schools with designated character may refuse enrolment applications if the parents do not accept the character of the school.

For more information you can:

- Visit the website [www.charterschools.govt.nz](http://www.charterschools.govt.nz).
- Read the [Education and Training Amendment Bill - New Zealand Parliament \(www.parliament.nz\)](http://www.parliament.nz)

## What is in this pack?

Documents that form part of this application are:

- Application suite comprising:
  1. Overview (PDF)
  2. What you'll get in funding (PDF)
  3. The measures and targets (PDF)
  4. Our timeline & approach to assessing your applications (PDF)
  5. The Response Form (docx)
- Appendix A. Application terms and conditions (PDF)
- Appendix B. Glossary (PDF)
- Appendix C. Charter School Agency funding calculator (xlsx)
- Appendix D. Governing members statutory declaration form (docx)
- Subsequent applicant notifications and/or addenda related to this application including:
  1. Charter School Agency Draft Agreement (docx)
  2. Further detail on Performance Management Targets

## Before you begin

Before you begin, please:

- Read this read this application pack in full (documents 1-5 + appendixes)
- Ensure you have all the required documentation and information.
- Use the GETS question/answer function if you have any questions.

## Communicating with us

The point of contact will manage all communications in relation to this application:

Detail	Description
Point of contact name:	██████████
Role:	Applications process lead

Communication will take place as follows:

- The application details will be posted on GETS as a closed opportunity.
- Questions can be asked by applicants through the GETS question/answer function.
- The Charter School Agency will communicate any changes, updates, or additional information to applicants by issuing updates through the addendum function on GETS.
- All information communicated to applicants through GETS form part of this application.

Any concern or complaint an applicant has regarding this application process must be raised with the point of contact. The concerns will be forwarded to Audit NZ for their independent examination.

### Will there be a briefing?

The applicant briefing will occur online. We will discuss the application format and provide key context about stage two of the application process. We strongly encourage you to attend to set expectations and have opportunity to ask questions. The briefing will not form part of the assessment. To attend the briefing, please use the link below:

Detail	Description
<b>Briefing date and time:</b>	17 September 2024   3:30pm
<b>Microsoft Teams Link</b>	[Redacted]

- You do not need to register with us to attend this briefing.
- If you miss it, we will be providing a transcript and the slide pack from the briefing to all stage two applicants.

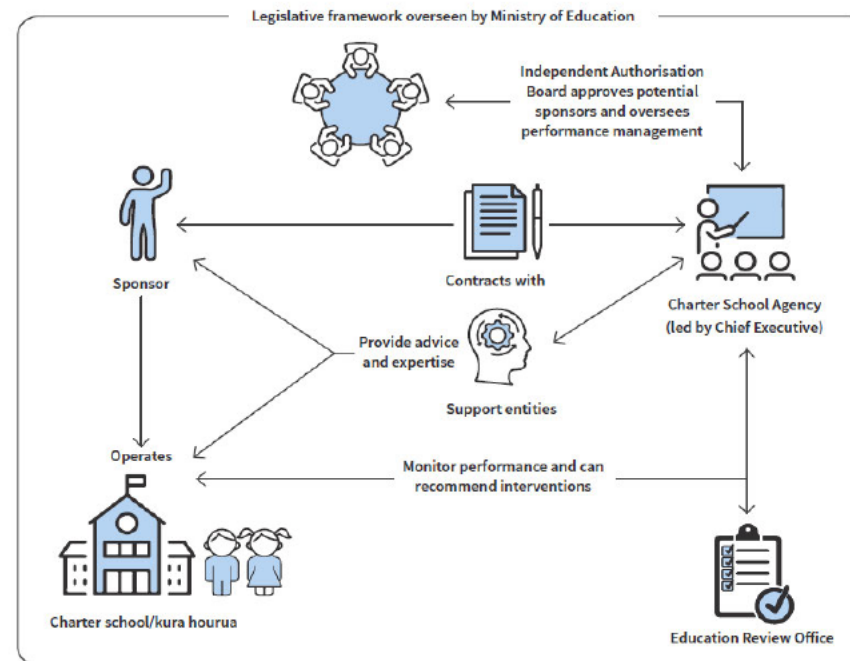
### Who will implement the charter school model?

The Charter School Agency is an autonomous departmental agency accountable and responsible for implementing the new charter school model. Its role includes:

- Secretariat for the Authorisation Board.
- Manage the application process, negotiate, and sign contracts with successful applicants and deliver funding.
- Ensuring professional expertise is available to support Charter Schools.
- Monitor compliance with the contract and
- Provide advice on sanctions to the Authorisation Board for non-performance.

### The Charter School model

#### Key elements of the Charter School | Kura Hourua Model



## The enabling legislation

The legislation to establish Charter Schools is the Education and Training Amendment Bill (the Bill). It sets out the legislative changes that must be made to the Education and Training Act 2020. The Bill is currently before parliament and is expected to be passed at the end of September.

The Bill also enables the establishment of the Authorisation Board. The Authorisation Board will be an independent statutory board with its functions and powers specified in legislation.

The Ministry of Education will continue to be responsible for the policy and legislation setting the overall framework for the New Zealand education system.

## Who makes decisions?

The Authorisation Board will approve Charter Schools. In making their decision, the Authorisation Board can set specific conditions on the approval of a sponsor if required.

While the application process is already underway, final decisions on Charter Schools will not be made until the legislation is passed and the Authorisation Board is established.

## What is expected of sponsors?

Sponsors will be required to meet their legislative and individual contractual requirements for their Charter School. If sponsors are not complying with their contractual or legislative obligations, the Authorisation Board can apply a series of interventions against sponsors.

Upon signing a contract with the Charter School Agency for up to 10 years, sponsors will receive funding that is broadly equivalent to state school funding. It will mostly be on a per-student basis and provided as cash to increase flexibility. (for example, cash instead of staffing entitlements, enabling sponsors to source the specific skills they need).

Across the life of the contract, sponsors must meet specified performance targets to continue to operate and receive funding for their Charter School.

## How does this application process fit into the programme?

The programme is ambitious to align with the opening date of Term 1 2025 for Charter Schools.

The application process is designed to work alongside key programme milestones:

Date	Milestone
June 2024	The Bill to bring Charter Schools   Kura Hourua into legislation was tabled
July 2024	Application stage one process was launched
September 2024	Recommendations due to be made on stage one applications allowing progression to stage two
September 2024	The Bill to bring Charter Schools   Kura Hourua into legislation is expected to be passed
September 2024	Establishment of the independent Authorisation Board (statutory powers)
November 2024	Stage 2 Applicants can now be approved and contracted
February 2025	The first Charter Schools   Kura Hourua open



## Building your stage two application

**In stage one**, we identified sponsors who were motivated to lift student achievement and attendance, showed an innovative and viable approach, and evidenced the experience, knowledge, and capability to deliver it.

**In stage two**, we are seeking more details about your leadership, contribution to the wider school network and operational fitness. In essence, we want to see how your application translates operationally into a living, breathing, thriving school so that the Authorisation Board has a robust understanding of the day-to-day realities for the student and teaching cohort at your school.

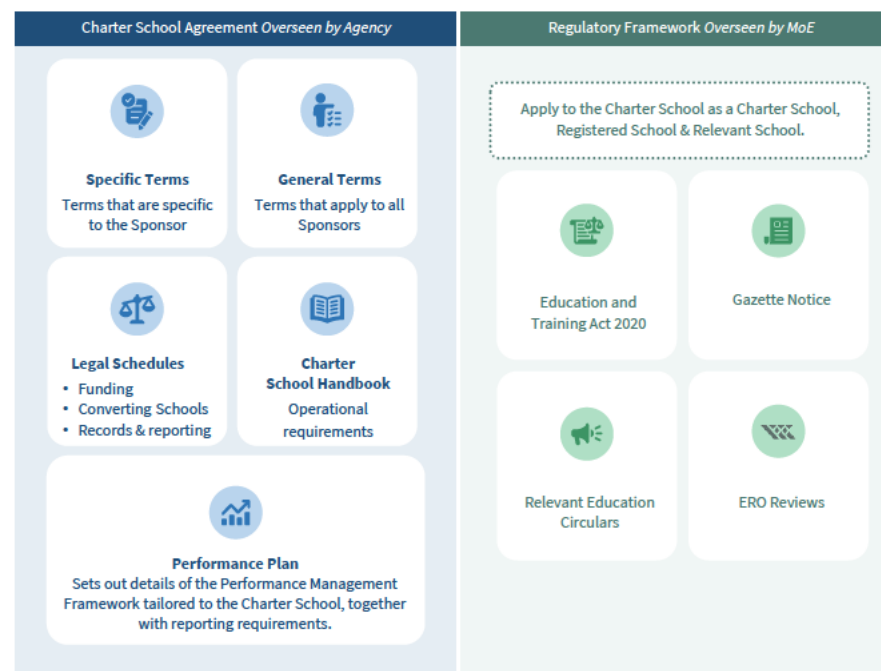
The 2024 application process is focussed on the first tranche of Charter Schools to open in 2025 and 2026. As there is limited funding, the focus is on applications that will maximise positive impact for their students and their community.

While getting to stage two is a great achievement, considering the level of interest, please remember that this does not guarantee approval of your application. Regardless of the outcome, we will be providing thorough feedback and communication to you throughout this process.

## Understanding the contract framework

The following diagram shows the format of the Charter School Agreement in its entirety. The Agreement template has been released with this application pack. Sponsors will need to comply with both the Agreement and the applicable Regulatory Framework.

- The Charter School Agency will not accept any proposed amendments to the General Terms and Legal Schedules of the Agreement. Applicants must prepare their application on this basis.
- Applicants wishing to propose any amendment to the Specific Terms of the Agreement for consideration must do so as part of this application.



## The contract terms

If your application is approved, your Agreement will commence November 2024. The anticipated contract term and options to extend are:

Description	Years
Initial term of the contract	Up to 10 years
Options for the Charter School Agency to extend the contract	Two extensions of 10 years each (10+10)
Maximum term of the contract	30 years (10+10+10)

- Individual contract renewals are subject to performance and continued public value being achieved.
- The estimated total value of the contract will be based on your funding entitlement.

### Support model

Sponsors and any resulting Charter Schools may be provided access to application support via contracted suppliers (support entities) engaged by the Charter School Agency.

We will be sharing more detail about the support entities very soon. Note that this support does not preclude sponsors and/or Charter Schools from accessing their own support.



### Updating your statutory declarations

In stage one we also asked you to supply statutory declarations for all **known** governing members. If you have any newly known governing members or changes to your existing governing members, please advise us and complete statutory declarations for any members that have not yet completed one.

See below from some common queries we had in stage one:

Common questions	Answer
Who witnesses it?	Your statutory declaration must be witnessed and signed by someone authorised to witness statutory declarations such as a Justice of the Peace, solicitor or notary public. You can find out who can witness these here - <a href="https://www.govt.nz/browse/law-crime-and-justice/making-a-statutory-declaration/">https://www.govt.nz/browse/law-crime-and-justice/making-a-statutory-declaration/</a>
How do they witness it in a statutory capacity?	Please ensure that the witness’s name and title is clearly identified. This may be via a stamp, or if they hand write their title and name alongside their signature.
How should I supply it?	Please ensure that your declaration is all in one format (i.e. written or typed) and type of document (i.e. PDF) to confirm the veracity of the document, for example handwritten, signed, and scanned into one document.
What if I don’t have a way to scan my documents?	We understand not everyone has access to a scanner and will accept a photograph of the document. But if you supply a photograph of the document, you <b>must</b> photograph the whole document on the page and not just a snip of the signature box.

## Feedback for your stage two application

Based on your stage one application, here is what the assessment panel are looking for in your stage two application:

- We want to hear from you, the sponsor. Focus on demonstrating the connection to your school in your application and help to provide us with a sense of the reality of a student or a teacher on the ground at the school.
- Answers should be backed up with examples to tell help us your story. For example, “the families in my community would choose my offering because....”
- Your success is built upon attracting students to obtain funding, but we want to see more than population growth statistics to understand how you will increase academic achievement so that families will choose your offering.
- Remember to provide assumptions on your numbers so that the financial story connects with the educational story and is realistic.

