Charter School Agency

Call for Applications
Sponsors of Charter Schools | Kura Hourua

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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

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Part one: Overview

1a. About Charter Schools | Kura Hourua

Charter Schools| Kura Hourua (charter school/schools) are a new type of state funded school. They are being established with the aim of lifting educational achievement of students. Budget 2024 provides $153 million for up to 15 new charter schools to be established, and 35 state schools to convert in 2025-26, depending on demand and suitability.

The name kura hourua draws on waka hourua, or double-hulled canoe, to signify the partnership between charter school operators and the Government, and between charter schools and their communities.

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, with the aim of achieving greater innovation in learning and increasing choice for students and parents. In exchange for greater flexibility, they are subject to increased oversight and accountability.

Sponsors will sign a contract for up to 10 years to meet specified performance requirements in return for state funding. Charter school funding will be broadly equivalent to state school funding. Funding will mostly be on a per-student basis and provided as cash to increase flexibility. This means, for example, that charter schools will get cash instead of staffing entitlements, enabling sponsors to source the specific skills they need.

All charter schools will be required to meet their legal requirements in both legislation, including the Education and Training Act 2020 and individual contracts. Proposed legislative requirements are set out in the Education and Training Amendment Bill currently before Parliament. If charter schools are not meeting their contractual or legislative obligations, there are a series of interventions that the independent Charter School Authorisation Board may take. The Bill is expected to be passed in the last quarter of this year.

The Charter School Authorisation Board will be an independent statutory board with its functions and powers specified in legislation. The Board will approve charter schools and apply interventions against sponsors that are not complying with contractual or legislative obligations.

The Charter School Agency is now beginning the application process to progress capable applications through to a second stage with the aim of having the first schools open in Term 1 2025. While the process can get underway, decisions will not be made until the legislation is passed and the Charter School Authorisation Board is established.

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.
- See the Associate Minister of Education's release on the Beehive website.
- Read the Education and Training Amendment Bill - New Zealand Parliament (www.parliament.nz)

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1b. How does this application process fit in?

We are looking for sponsors who are motivated to lift student achievement and attendance, have an innovative and viable approach and the experience, knowledge and capability to deliver it.

The legislation sets out that when selecting sponsors, the independent Charter School Authorisation Board will take into account a number of factors, including the focus of the proposed school, the capability of the sponsor, the standard of tuition to be provided, the level of support from the community, financial implications and the potential impact on the wider state and state-integrated school network, given the proposed location, anticipated roll and other factors.

For converting schools, there are additional criteria such as the performance of the school and the level of support from the school community, school staff, and students.

The independent Charter School Authorisation Board can set conditions on the approval of a sponsor.

This year we are conducting a two-stage application process to select sponsors:

- **Stage one:** set out in this document, will establish the suitability of potential sponsors and the viability of their intentions.
- **Stage two:** will be a detailed evaluation of plans to establish and operate a school where children are safe, attending and achieving. The details of stage two are still being finalised.

Decisions will be made by the independent Charter School Authorisation Board once the legislation is passed.

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

In stage one we are seeking purpose statements and high-level business plans from those interested in establishing charter schools | kura hourua. In stage two, we anticipate a staged timetable, with schools aiming to open in Term 1 2025 considered in the first tranche, and others following. We recognise that some sponsors may need longer to prepare their applications and may want a longer lead time before opening.

We are still finalising the detail of stage two of the process and will provide this before stage one is complete. Keep in mind that we anticipate further applications beyond this first round, and the process may evolve. Should you miss out on this opportunity, or not be quite ready to respond just yet please take the time to prepare for a future round of applications.

Information about future rounds will be communicated through our website, and other relevant channels.

1c. Before you apply

Before you apply, please:

1. read this read this application pack in full
2. ensure you have all the required documentation and information.

Email Applications@charterschools.govt.nz if you have any questions.

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1d. Application process

The details of this stage one application process are covered in more detail further on in this document. An overview of the whole process and what information we'll be seeking and when is as follows:

Stage	Timing	Details
Stage one applications	Applications due by deadline for applications date	Applications for stage one need to include detail on your: 1. Fit and proper persons declaration/s 2. Purpose statement 3. High-level business plan 4. Network and funding considerations
Charter School Agency conducts assessments	Throughout August	Applications are scored and considered as a full potential school network. Some judgement is applied to possible positive impact on students and communities.
Stage two applications	September to October	This detail is being finalised and is not required at stage one, but, at a high level, stage two applications will ask for detail on your: 1. Full business plan 2. Leadership and capability of the sponsor 3. Additional value of the school including student impact 4. Operational fitness in relation to the performance management framework
Authorisation board approves applications for negotiation	Throughout October	The Charter School Agency will negotiate with each applicant with a view to contracting sponsors for the establishment of new and converting charter schools | kura hourua
The first charter schools | kura hourua open	Term 1, 2025	New schools will undergo Education Review Office (ERO) review prior to opening as any new school would. Converting schools will need to confirm establishment commitments have been met prior to opening. For example, this could include teaching workforce, payroll, curriculum development.

Part two: Key information

a. This application, issued by the Charter School Agency, is an open invitation to individuals and organisations to submit an application to sponsor a charter school | kura hourua for assessment.

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b. This is a two-stage process. Resulting from this first stage, and at the discretion of the Charter School Agency, the potential sponsor may be invited to submit an application for stage two.

2a. Application timeframes for stage one

a. Schools can begin to open from Term 1, 2025, but each sponsor journey will be individual.

b. The indicative timeline for stage one applications is:

Application published on GETS and Charter Schools website	11 July 2024
Applicant briefing (online, week of)	3:30pm, 18 July 2024
Deadline for questions from applicants	12pm, (midday), 31 July 2024
Deadline to respond to questions	12pm, (midday), 2 August 2024
Deadline for applications	12pm, (midday), 9 August 2024
Applicant selection process (week starting)	12 August 2024
Applicant decisions communicated (week starting)	2 September 2024
Stage two application opens	2 September 2024
Debriefs for unsuccessful applicants commence (week starting)	16 September 2024

c. All dates and times are dates and times in New Zealand. The timeline may be subject to change via an applicant notification.

2b. Communications

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

Point of contact name: **Helen Saville**

Role: Applications process lead

b. Communication will take place as follows:
   i. The application details will be posted on GETS and will also be posted on the Charter Schools website
      i. Questions can be asked by applicants through the GETS question/answer function or through the email address Applications@charterschools.govt.nz
      ii. The agency will communicate any changes, updates, or additional information to applicants by issuing updates through the addendum function on GETS and posting updates on the website
      iii. All information communicated to applicants through GETS and the website form part of this application.

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

d. The applicant briefing will occur online through Microsoft Teams. It will outline the application format and provide key context about charter schools | kura hourua. We strongly encourage you to attend the session to set expectations and have opportunity to ask questions. The briefing will not form part of the assessment.

e. To attend the briefing, please email Applications@charterschools.govt.nz with your organisation name and to receive the link.

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2c. Preparing your application for submission

a. Documents that form part of this application are:
    i. Application document (this document and any subsequent applicant notifications and/or addenda related to this application)
    ii. Response form and application declaration (Word attachment, and any subsequently requested information from applicant)
    iii. Appendix 1: Charter School Agency application terms and conditions (PDF)
    iv. Appendix 2: Charter School Agency application glossary (PDF)

b. Please read all documents provided and return in PDF format the completed and signed response form including the application declaration and signed individual statutory declaration forms.

c. 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 it is outlined in the drafted Amendment to the Education and Training Act 2020 (applicable to all individuals in the applying organisation) before their application can be assessed.

d. Your application response must include individual signed statutory declaration forms for the sponsor and all governing members. These declarations should also be signed by a witness. Applications that omit signed statutory declarations for the sponsor and all governing members will not be assessed.

e. In the course of reviewing the statutory declarations, further due diligence information may be required. In your applicant declaration, you will agree/disagree to allow the Charter School Agency to request/gather and share your information with third parties to undertake due diligence. In disagreeing to allow the Charter School Agency to conduct external due diligence could result in your application being declined for assessment.

f. The assessment and context parts of your application for stage one cover two key criteria. These are covered in more detail in part three, but at a high level are:

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

g. Responses for each section are to be written.

h. An application may be received from the following:
    i. A business or organisation defined as a body corporate, corporation sole, limited partnership, institution, or related entity (the proposed sponsor):
    ii. In the case of a converting state school —
        - the school's board with the support of a proposed sponsor; or
        - one (1) or more members of the school community with the support of a proposed sponsor.

2d. Submitting your application

a. Applications can be submitted as follows:
    a. electronically through the GETS e-Tender box function. Please plan accordingly to allow sufficient time to allow the upload to complete before the application deadline.

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b. Applications not submitted by the deadline time and date may be excluded from assessment at the discretion of the Charter School Agency.

c. Please clearly name your files as follows:
   - [Applicant/sponsor name – Response form for charter schools / kura hourua]
   - [Applicant/sponsor name – Statutory declaration for charter schools / kura hourua]

2e. Application process terms and conditions

a. This process is undertaken in accordance with the Charter School Agency application terms and conditions. By submitting an application, the respondent agrees to the terms and conditions appended to this application.

Part three: Application process information

3a. Key timeframes

a. Key timeframes that the application process must align to are:

Date	Activity
June 2024	The Bill to bring charter schools | kura hourua into legislation is tabled
July 2024	Application stage one process can now be launched
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	Successful sponsors can now be contracted
February 2025	The first charter schools | kura hourua open

3b. Proposed contract

a. The contract 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)
Contract type	Bespoke

b. Individual contract renewals are subject to performance and continued public value being achieved.

c. The estimated total value of the contract will be based on your funding entitlement.

d. The draft contract will be released as a part of the stage two application process. The Act outlines at a high level the obligations of the sponsor at a statutory level for compliance. The contracts will outline in detail specific legally binding obligations as well as frameworks to deliver outcomes.

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3c. Performance management

a. The performance management framework will form part of the contract and will be circulated at stage two.
b. It will detail specific outcomes, measures, and targets and is being designed to support meeting the performance outcomes stipulated within the proposed Act. The purpose of the framework is to enable intervention when required while also supporting high-performing charter schools to grow and share good practice.
c. It will set out clearly defined performance metrics and at a high level will include but may not be limited to:
   i. Education outcomes (such as student achievement)
   ii: Non-education performance (such as financial and reporting)
   iii: Compliance (such as audits).

3d. Funding components

a. The types of funding available to successful sponsors are:

No.	Type	Description
1.	Establishment funding	For new charter schools funding to establish the school which includes: 1. A per-student amount approximating the state school rate for administration, library/resource centres, and teaching and learning material costs. 2. funding to employ principals, senior teachers, and other teachers in the period before opening.
2.	Staff-based funding	Funding based on a per-student rate and paid as cash calculated based on school type and number of students. Additional funding is provided for Māori or Pacific immersion education for specific students.
3.	Services-based funding	Funding for specific nationally provided services that for state schools is provided by the Ministry of Education, including digital, payroll services and nationally provided professional learning and development services. This is calculated based on per-student value based on state school service provisions. **Note.** *not all services are included in this rate. Charter schools can access some of these other services separately.*
4.	Operational grant funding	Same operational grant components as with state schools with components that are not "per-student" replaced with broadly equivalent per-student funding.
5.	Property funding	Per-student rates for capital maintenance and the renewal of furniture and equipment based on the property arrangement (Ministry or Non-Ministry property) and the relevant state school funding components. For charter schools in Ministry-owned property, there will be a transition over five years where funding and responsibility is split between the Ministry and the sponsor.

b. Learning support will be provided based on the needs of the individual student and is excluded from the funding above.

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Part four: Application assessment

4a. Pre-conditions

a. Applications must meet the following pre-conditions. Applications that fail to meet this condition will not be considered further:

Pre-conditions	Confirmation of meeting pre-condition
Pass/Fail to progress to assessment stage	
Fit and proper person test **<u>The sponsor and all known governing members</u>** (and future governing members as they become known) must show that they are a fit and proper organisation/person as it is 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.	
Proposed secondary qualification system Applicants must confirm that their secondary qualification system is nationally or internationally recognised.	

4b. Assessment method

a. Three assessment ratings are available; **Not Viable, Potentially Viable, Viable**
   i. **1 (Not Viable):** If you receive a "1" in any criteria, the Charter School Agency will consider if your application should be removed from the process.
   ii. **4 (Potentially Viable):** If you receive a "4" in any criteria, the Charter School Agency will consider your application, but you are not guaranteed progression to stage two.
   iii. **7 (Viable):** If you receive a "7" in all your criteria, your application will automatically progress to stage two.

4c. Assessment criteria

a. The assessment criteria is as follows:

Stage one - PART A: Purpose statement to test viability and leadership		
Overall weighting		30%
Purpose statement covers:		
1. Motivation and interest	1 (Not Viable)	Motivation and interest are unclear or inadequately articulated.
	4 (Potentially Viable)	Motivation and interest are clear but lack comprehensive detail.
	7 (Viable)	Motivation and interest are clearly articulated, compelling, and align well with the proposed school's aspirations and benefits.
2. Aspirations and benefits	1 (Not Viable)	Aspirations are vague and do not demonstrate clear benefits for students.
	4 (Potentially Viable)	Aspirations are somewhat clear but lack specific benefits for students.

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	7 (Viable)	Aspirations are clearly defined, showing significant potential benefits for students.
3. Education strategy	1 (Not Viable)	Strategy for education is unclear or inadequately articulated.
	4 (Potentially Viable)	Strategy for education is clear but lacks compelling detail.
	7 (Viable)	Strategy for education is clearly articulated, compelling, and aligns well with educational best practice.
4. Innovation and/or choice for parents	1 (Not Viable)	Innovation is vague and does not demonstrate clear benefits and/or choices for communities of the proposed school.
	4 (Potentially Viable)	Innovations outlined and demonstrate some benefits but not strongly articulated choices for communities of the proposed school.
	7 (Viable)	Innovations are clearly defined, showing significant potential benefits and tangible choices for communities of the proposed school.
5. Opportunity for students in the proposed school's community	1 (Not Viable)	No consideration of opportunity for students in the proposed school's community.
	4 (Potentially Viable)	Some consideration of opportunity for students in the proposed school's community but lacks comprehensive approach.
	7 (Viable)	Strong consideration and commitment to provision of opportunity for all students in the proposed school's community.

Stage one PART B: High-level business plan to build educational performance		
Overall weighting		70%
High-level business plan covers:		
1. Student achievement	1 (Not Viable)	No clear plan to deliver academic achievement.
	4 (Potentially Viable)	Some plans in place but lacks detailed strategies to deliver academic achievement.
	7 (Viable)	Comprehensive plan with clear, detailed strategies to deliver academic achievement.
2. Student demographic and attendance	1 (Not Viable)	No clear plan considering student demographic and attendance against performance management measures.
	4 (Potentially Viable)	Some plans in place but lacks detail in considering the student demographic and attendance against performance management measures.
	7 (Viable)	Comprehensive plan with clear, detailed consideration of the student demographic and attendance against performance management measures.
3. Financial sustainability	1 (Not Viable)	No clear source(s) of funding identified and/or no financial sustainability strategy outlined.

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	4 (Potentially Viable)	Source(s) of funding identified but lacks detail to articulate how the funding sources will ensure financial sustainability.
	7 (Viable)	Source(s) identified and detailed strategy outlined for operating with financial sustainability.
4. Workforce planning	1 (Not Viable)	No clear workforce planning approach or governance structure outlined.
	4 (Potentially Viable)	Some workforce planning and governance has been considered but it lacks detail and strategy.
	7 (Viable)	Detailed and strategic workforce planning approach outlined with a clear governance structure described.
5. Context and environment	1 (Not Viable)	No understanding of the context or environment of the proposed school.
	4 (Potentially Viable)	Some understanding of the context and environment of the proposed school but lacks depth and detail that shows how the school will fit into its environment.
	7 (Viable)	Thorough understanding of context and environment, with detailed analysis of school network, demand, and population forecasts.
6. Physical and Cultural Assets *Physical assets i.e., infrastructure, technology [**new schools only**]* *Cultural Assets if relevant [**all schools**]*	1 (Not Viable)	No clear plan for required assets outlined.
	4 (Potentially Viable)	Some assets identified but lacks detailed planning in consideration of the specific assets the proposed school will need to deliver its educational objectives.
	7 (Viable)	Comprehensive plan for physical and cultural assets, aligned with the proposed school's academic objectives.

4d. Progressing an application

a. Selection of applicants to progress to stage two will take into account:
   i. If the applicant (sponsor and governing members (and future governing members as they become known)) have shown that they are a fit and proper organisation/person as outlined in the draft legislation (applicable to all individuals in the applying organisation).
   ii. If the applicant has shown use of a nationally or internationally recognised secondary qualification system.
   iii. An applicant's weighted assessment score.
   iv. Network and funding considerations including converting school performance, Crown financial implications, views of the Secretary for Education.
   v. Any due diligence undertaken (including any related to the fit and proper persons test).

4e. Due diligence

a. Due diligence may be undertaken before, during or after assessment on one or more application/applicant to determine whether entering into a contract with an applicant may expose the agency to undue risk. Written approval of the applications process approver is required to exclude any application from assessment or selection for due diligence reasons. Types of due diligence that may be requested include but are not limited to:
   i. Reference checks
   ii. Clarifications, interviews, and/or presentations
   iii. Police vetting of personnel

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iv. Checks to determine the accuracy/completeness/validity of applications
v. Companies Office search
vi. Review of an applicant's financial viability
vii. Review of an applicant's business practices and other probity issues
viii. Review of an applicant's disputes with the ministry and/or other parties
ix. Review of an applicant's ownership/structure
x. Review of an applicant's director status
xi. Review of an applicant's conduct

4f. Conflicts of interest

a. The applicant warrants that it has no actual, potential, or perceived conflicts of interest in submitting this application or entering into a contract to establish a school. Where a conflict of interest arises during the application process, the applicant/s will report it immediately to the applicant point of contact.

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Appendix 1: Charter School Agency application terms and conditions

Attached to the GETS application notice.

Appendix 2: Charter School Agency application glossary

Attached to the GETS application notice.

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Published by the **Charter School Agency**

PO Box 1666, Wellington 6140

Visit www.charterschools.govt.nz for more information

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

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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

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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

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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	
Fit and proper person test **<u>The sponsor and all known governing members</u>** (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.	Completed and signed statutory declaration for the sponsor of this application submission has been provided. **Yes / No** Individual completed and signed statutory declarations for all known governing members at the time of this application submission have been provided. **Yes / No** Prior to the appointment of future governing members, individual completed and signed statutory declarations will be provided to the agency without delay. **Yes / No**
Proposed secondary qualification system Must be internationally or nationally recognised.	**Yes / No** State your qualifications system.

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

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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**	*If yes, please provide details of the offence and/or crime.*
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**	*If yes, can you provide details such as a statement of your financial obligations and status with the Crown?*
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**	*If yes, what were the circumstances and outcomes of such interventions?*
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**	*If yes, can you provide details of any such breaches and measures taken to address them?*
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**	*If yes, please detail what these factors or concerns are and how you would address them.*

DECLARATION

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

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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

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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**	*If yes, please provide details of the serious criminal activity.*
Bankruptcy and director/promoter prohibitions	Has the governing member been • 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, o a company under the Companies Act 1993 or o any other body corporate?	**Yes / No**	*If yes, can you provide details such as bankruptcy records or declarations regarding prohibitions?*
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**	*If yes, what were the circumstances and outcomes of such interventions?*
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**	*If yes, can you provide details of any such breaches and measures taken to address them?*

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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**	*If yes, please detail what these factors or concerns are and how you would address them.*
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		

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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

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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

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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.

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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	

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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	The applicant/s authorises the Charter School Agency and the Ministry of Education to: 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. The applicant/s agrees that all such information will be confidential to the Charter School Agency and the Ministry of Education.	**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**
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'		
DECLARATION I/we declare that in submitting the application and this declaration: 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. 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. 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.		
Signature:	signature of authority on behalf of sponsor	

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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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Charter School Agency

Published by the **Charter School Agency**

PO Box 1666, Wellington 6140

Visit www.charterschools.govt.nz for more information

Charter School Agency

Charter School Agency
Sponsor application terms and conditions

Part One. Preparing and submitting an application

1. Preparing an application

a. The applicant must:
   i. Read the complete application and any additional information provided and referred to by the Charter School Agency.
   ii. Respond using the application response form provided and include all information that the Charter School Agency requests.
   iii. Make sure the details in the application are correct and not misleading in any material aspect.
b. By submitting an application, the applicant accepts the application terms and conditions outlined in this document.
c. The applicant must make sure they understand the application process. If the applicant has any questions or needs clarification, they:
   i. Must submit questions before the deadline for questions outlined in the application document.
   ii. Must clearly indicate any commercially sensitive information in their questions.
   iii. May withdraw their questions at any time.
d. When the Charter School Agency receives questions before the deadline for questions, they:
   i. Will respond on or before the deadline for answers.
   ii. May provide details of both the questions and the answers to other applicants. In these circumstances the Charter School Agency will summarise the questions and will not disclose the applicant's identity.
   iii. Will post both the questions and answers on GETS.
   iv. Will not publish the applicant's commercially sensitive information. If the Charter School Agency considers the information to be significant for all applicants, the Charter School Agency may modify the question and publish both this and the answer. In that case the Charter School Agency will first give the applicant the opportunity to withdraw the question or remove any of their own commercially sensitive information.
e. Except as otherwise stated in the application, the applicant must meet their own costs associated with the preparation, presentation and negotiation of the application.

2. Submitting an application

a. The applicant must ensure the Charter School Agency receives the application through the correct channel and in the correct format on or before the deadline for applications.
b. After the deadline for applications, the Charter School Agency will acknowledge receipt of the application.
c. The Charter School Agency may rely on the application and all information provided by the applicant during the application process (e.g., Correspondence and negotiations).

3. Assessing applications

a. The Charter School Agency's assessment panel will assess the application. The make-up and roles of the panel members are at the discretion of the Charter School Agency. Different panel members may

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assess different aspects of the application and it may include independent and/or external advisors as panel members to assess some or all aspects of the application.

b. The Charter School Agency may ask the applicant for more information or clarification on the application at any time during the application process but need not ask all applicants for the same clarification.
c. The applicant agrees to provide the information or clarification as soon as possible, in the format requested by the Charter School Agency.
d. If the applicant does not provide adequate information or clarification within a reasonable time (as determined by the Charter School Agency), the Charter School Agency may remove the application from its assessment process.
e. The Charter School Agency will assess the application according to the assessment approach outlined in the application document but may adjust its assessment after considering additional information or clarification, as described in 3.b. above.
f. The Charter School Agency must treat each assessed applicant fairly.
g. The Charter School Agency may exclude the applicant from the application process on the following grounds:
    i. Breach of the application terms and conditions and the Charter School Agency considers the impact of the breach is more than trivial (this applies whether or not the provision in question is itself legally binding on the recipient).
    ii. Inclusion of a material error, omission or inaccuracy in the application.
    iii. Does not meet any aspect of the application process pre-condition(s) or other aspect of the assessment.
    iv. Serious performance issue in a previous, or current, contract delivered by the applicant
    v. A material conflict of interest arises.
    vi. The Charter School Agency considers the integrity of the applicant is in doubt due to the applicant's professional misconduct or an act or omission.
    vii. The Charter School Agency becomes aware of any other matter that materially diminishes the Charter School Agency's trust in the applicant.

4. Decisions to progress applications

a. The Charter School Agency will progress applicants who have met the assessment approach outlined in the application document through to the next application stage.
b. The Charter School Agency may adjust who progresses after considering additional information or clarification, as described in as described in **3.b. and 3.g.** above.
c. If any applicant application is progressed, this does not mean the Charter School Agency has accepted any applicant and/or application or made any form of offer or commitment. There is no obligation on the Charter School Agency to progress an application to further or enter into negotiations with, or award any contract to, any applicant.

5. Applicant debrief

a. At the end of the application process, the Charter School Agency will offer to debrief the applicant. This debrief may be by letter, email, phone or a meeting.
b. The Charter School Agency will provide the debrief within 30 business days from either the date of the applicant's acceptance of a debrief, or the date the contract(s) is/are signed, whichever is later.
c. The debrief will:
    i. Explain why the application was or was not progressed.
    ii. Explain how the application performed against the pre-conditions and the assessment criteria.
    iii. Indicate the application's relative strengths and weaknesses.
    iv. Explain, in general terms, the relative advantages of successful applications.
    v. Seek to address any concerns or questions from the applicant.
    vi. Seek feedback from the applicant on the application and application process.

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vii. Provide guidance to the applicant about future applications and where prudent direct them to available support for future applications.

6. Notification of Outcome

a. After final decisions have been approved, the Charter School Agency:
   i. Will let all unsuccessful applicants know in writing that they have not been approved and offer a debrief to the applicant.

7. Issues and Complaints

a. The applicant may, in good faith, raise with the Charter School Agency any issue or complaint about the application or application process at any time. When this occurs:
   i. The Charter School Agency will consider and respond promptly and impartially to the applicant's issue or complaint.
   ii. Both the applicant and the Charter School Agency must do their best to resolve the issue or complaint.
   iii. The Charter School Agency must not allow the issue or complaint to prejudice the applicant's participation in the application process, or limit or affect the applicant's future applicant opportunities.

Part Two. Standard application conditions

8. Application point of contact and communication

a. The applicant must not approach any employee or other representative of the Charter School Agency, the Ministry of Education (as host of the Charter School Agency) or the independent Charter School Authorisation Board directly or indirectly, for information on any aspect of the application.
b. Only the point of contact, or a person authorised by the Charter School Agency, may communicate with the applicant on any aspect of the application or application process. The Charter School Agency will not be bound by any statement made by any other person.
c. The Charter School Agency may change its point of contact at any time. The Charter School Agency will notify the applicant of any change by posting a notification on GETS and the charter schools website.
d. If the applicant has an existing contract with the Charter School Agency, or Ministry of Education, the applicant must not use its business-as-usual communications to contact the Charter School Agency regarding the application.

9. Ethics

a. The applicant must not attempt to influence, reward or benefit any representative of the Charter School Agency or the Ministry of Education, nor offer any form of personal inducement, in relation to the application or the application process.
b. To maintain a fair and ethical application process, the Charter School Agency may require additional declarations or other evidence from the applicant, or any other person, at any time.

10. Anti-collusion

a. By submitting the application, the applicant warrants that:
   i. The application has not been prepared in collusion with another party.
   ii. It will not engage in deceptive or improper conduct during the application process.
b. The Charter School Agency reserves the right to report suspected collusion or deceptive or improper behaviour to the appropriate authority, and to give that authority all relevant information, including the application.

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11. Confidential information

a. Without limiting any other confidentiality agreement between them, the Charter School Agency and the applicant will both take reasonable steps to protect the other party's confidential information.
b. Except as permitted by the other provisions of this section 11, neither party will disclose the other party's confidential information to a third party without that other party's prior written consent.
c. Each party may each disclose the other party's confidential information to anyone who is directly involved in the application process on that party's behalf, but only for the purpose of participating in the application. This could include (but is not limited to) officers, employees, consultants, contractors, professional advisors, assessment panel members, partners, principals or directors. Where this occurs, the disclosing party must take reasonable steps to ensure the third party does not disclose the information to anyone else and does not use the information for any purpose other than participating in the application process.
d. The applicant acknowledges that the Charter School Agency's confidentiality obligations are subject to those outlined in the Official Information Act 1982 (OIA), the Privacy Act 2020, Parliamentary and Constitutional Convention, and any other obligations imposed by law. Where the Charter School Agency receives an OIA request that relates to an applicant's confidential information, the Charter School Agency will consult with the applicant and may ask the applicant to explain why the information is considered by the applicant to be confidential or commercially sensitive.
e. The applicant may disclose the Charter School Agency's confidential information to the extent strictly necessary to comply with law or the rules of any stock exchange on which the securities of the applicant or any related entity are currently listed. Unless prohibited by law, the applicant must consult with the Charter School Agency before making such a disclosure.
f. The Charter School Agency will not be in breach of its obligations if it discloses confidential information to the appropriate authority because of suspected collusive, deceptive or improper behaviour.

12. Ownership of documents

a. The application and its contents remain the property of the Charter School Agency. All intellectual property rights in the application remain the property of the Charter School Agency or its licensors.
b. The Charter School Agency may request the immediate return or destruction of any application documents and any copies, in which case the applicant must comply in a timely manner.
c. All documents forming part of the application will, once they are sent to the Charter School Agency, become the property of the Charter School Agency. The application will remain on file with the Charter School Agency to keep appropriate records.
d. Intellectual property rights in the application remain the property of the applicant or its licensors.
e. The applicant grants to the Charter School Agency a licence to retain, use, copy and disclose information contained in the application for any purpose related to the application process, including keeping appropriate records.

13. Charter School Agency's additional rights

a. The Charter School Agency may amend, suspend, cancel or re-issue the application, or any part of it, so long as it notifies the applicant.
b. The Charter School Agency may change material aspects of the application, such as the timeline, requirements or assessment approach, provided it gives the applicant time to respond to update its application in relation to the changes.
c. The Charter School Agency may accept a late application if it is the Charter School Agency's fault it is late, or if the Charter School Agency considers there is no material prejudice to other applicants in accepting a late application.
d. The Charter School Agency may answer a question submitted after the deadline for questions and notify all applicants about the submission of the question and the answer.
e. The Charter School Agency may waive requirements or irregularities around the application process if the Charter School Agency considers it appropriate or reasonable to do so.

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14. New Zealand law

a. The laws of New Zealand govern the application process. Each applicant agrees New Zealand courts have non-exclusive jurisdiction to rule in any dispute concerning the application or the application process. The applicant agrees that it cannot bring any claim in relation to the application process except in a New Zealand court.

15. Disclaimer

a. Nothing contained or implied in the application, or application process, or any other communication by the Charter School Agency to the applicant is to be construed as legal, financial or other advice.
b. The Charter School Agency will endeavour to provide accurate information in any communication, but the applicant accepts this information is not independently verified and may not be up to date.
c. The Charter School Agency will not be liable in contract, tort, equity, or in any other way for any direct or indirect damage, loss or cost incurred by the applicant or any other person in respect of the application process, whether as a result of the Charter School Agency exercising its rights under section 13, the Charter School Agency's negligence or breach of these application terms, the Charter School Agency failing to select the applicant as an approved Applicant, or any other cause.

16. Precedence

a. Any conflict or inconsistency in the application process shall be resolved by giving precedence in the following descending order:
    i. **Part 2: Key Information** of the application document.
    ii. These application terms and conditions.
    iii. All other sections of the application document.
    iv. Any additional information or document provided by the Charter School Agency to applicants through the Charter School Agency's point of contact or GETS.
    v. If there is any conflict or inconsistency between information or documents having the same level of precedence the more recent information or document will prevail.

For more information you can visit the website www.charterschools.govt.nz.

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Charter School Agency

Glossary of Application Terms
Sponsors or Charter Schools | Kura Hourua

The Act means the Education and Training Act 2020.

Amendment to the Education and Training Act 2020 / The Bill means the Education and Training Amendment Bill submitted to the Cabinet Legislation Committee relating to Charter Schools | Kura Hourua resulting in legislation (The Act) once passed.

Applicant means a business or organisation who has submitted an application to be considered as a sponsor of a charter school.

Application, Sponsor Application means the information provided in response to the Charter School Agency Application Process by an applicant who wants to be considered as a Sponsor of a charter school.

Application Process means the process run by the Charter School Agency to receive and have considered applications relating to charter schools.

Approval means independent Charter Schools Authorisation Board decision to approve applications to proceed to contract negotiations to be led by the Charter School Agency.

Assessment means the reviews, and evaluation undertaken on applications, by the Charter School Agency

Authorisation Board / independent Charter Schools Authorisation Board means the independent board which is to be established under section 212A of the Act, via the Amendment to the Training and Education Act 2020 to make decisions on the application process.

Business or Organisation means by definition in the Act, a body corporate, corporation sole, limited partnership, institution, or related entity applying to be considered as a sponsor.

Charter School | Kura Hourua or Charter School means a school operated by a sponsor, that been approved by the independent Authorisation Board, in contract with the Crown under the Education and Training Act 2020 (once the Amendment to the Education and Training and Education Bill is passed).

Charter School Agency means the departmental agency established on 1 July 2024 under the Public Service Act 2020, to implement and operate the new charter school model, including negotiating and managing contracts, delivering funding and supporting the independent Charter Schools Authorisation Board.

Contract or Charter School Contract means a contract for the establishment and operation of a charter school entered into under section 212L of the Act, and in relation to a sponsor, means the charter school contract to which the sponsor is a party.

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Converting or Converting State School means a state school that proposes to convert (apart from State integrated schools, distance schools, Kura Kaupapa Māori, specialist schools, and designated character school) to a charter school.

Due Diligence means checks undertaken on information provided and as required as described in the Application.

Focus/Setting means the individual characteristics of the school.

Governing member means any director or member occupying a position equivalent to that of a director, a trustee and/or partner.

LATS means limited authority to teach enables people without a teaching qualification to teach in positions where there's need for specialist skills or skills are in short supply.

Ministerial Advisory Group means the independent group established to provide advice to the Minister relating to charter schools.

Model means the described approach and structure to successful contribution and/or operation to the proposed charter school.

Network or School Network means the 2,500 (on or near at any time) state, state-integrated and any charter school established schools across New Zealand (including the Chatham Islands) funded by the Government.

Physical or Cultural Asset or Asset means any property of value relating but not limited to infrastructure, technology, culture.

Potential or Proposed Sponsor means the Business or Organisation interested in or having submitted an Application.

Proposed School means the existing state school or new school.

School/Schools means state or private schools (other than a specialist school).

School Community or Community means the definition given in section 10 (1) of The Act.

Sponsor means the governing body of a charter school approved by the independent Charter Schools Authorisation Board to operate a charter school under section 212I of the Act.

Stage One means the first step of two stages of this application process determining invitations to stage two.

Stage Two means the second of two stages of this application process of which is by invitation following stage one.

State School means the Government funded Crown entities that offer free education as set out in the Act.

The Minister means the Associate Minister of Education, Hon. David Seymour.

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Charter School Agency

Notifications for Applicants
Sponsors of Charter Schools | Kura Hourua

Version 1.0 **Date:** 17 July 2024

Your questions answered (Q&A)

Below are the questions we've received from you about the application to date. We'll be updating this section regularly as we receive and answer these.

Application process		
No.	**Question**	**Answer**
1	How do we join the Applicant briefing happening on Thursday 18 July 2024 at 3:30pm?	To register, email **applications@charterschools.govt.nz** to request the link. The session will also be recorded and shared.
2	For the briefing, how many people from an organisation / group are allowed to attend?	There is no limit to how many people from your organisation or group can attend the briefing. Please invite who you think will be most beneficial to have at the briefing, noting that we are happy for you to share the link internally and only ask that you do not share the link outside of your organisation.
3	Is this the only briefing that you are holding, or will you hold more?	Yes, we will hold more based on demand. If you haven't been able to register for this event, please reach out via **applications@charterschools.govt.nz** if you are interested in attending another briefing.
4	How are you going to share information throughout this process?	Alongside publishing specific application Q&A, we will release factsheets for common questions and topics, available here for viewing and downloading: **https://www.charterschools.govt.nz/information-for-sponsors/** . We expect to have fact sheets up on ***property*** and ***funding*** shortly.
5	What does it mean when it asks me to create a 'supplier account' on GETS? I'm not a business; I'm a school.	This is simply the terminology that GETS uses to classify who is providing a good/service. However, anyone can set up a GETS account, and in lieu of a business name or details, you

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		can put your organisation or school details as you see fit. Please note that you will need a RealMe account to set-up your GETS supplier account. There is detail on the GETS site if you run into any issues: **https://www.gets.govt.nz/SupplierUserTenderHelp.htm**
6	On the application form there are some questions where it's appropriate to attach a document that answers the question. Is there a preference regarding attachments and how they are best shared with you?	If you can, please respond with as much of your answer supplied written against the question with a reference to the supporting document. Links within the document or separate attachments such as PDFs are both acceptable ways to attach the document but remember that there is a maximum of 50mb for your file uploads, so often times a link is a better option than attachments.

Application content - funding		
No.	**Question**	**Answer**
1	What is the funding model and when will information be available for the possible revenue in order to provide more accuracy to complete the financial sustainability section of the application?	We are planning to have more detailed information on funding out shortly. In the response we are asking for a budget at a high-level that shows expected revenue vs expected costs. We are not asking for a detailed budget at this stage and would not expect any high-level budget presented in your application to be final. It is useful for us to understand how you plan to allocate funding and how you will ensure oversight and accountability.
2	Further to above question, we understand the high-level response wanted but for the revenue, the information you refer to having available shortly, does this mean prior to submission? If not, what is the best way to estimate govt support per student; just based on other state school equivalents?	We are preparing factsheets about the funding model and intend to share more with you at the briefing (Thursday 18th July) so that you have enough information before the application close date of 9 August for you to prepare this section. At a glance, our factsheet will cover many of the topics we're receiving questions about, such as: • Capital funding for building maintenance • Property funding for business leases

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		• The funding components
3	*Re property maintenance fees / attendance dues* In a scenario where there would be leased facilities and a base rate schools would charge their students; would you expect to see how the per student fee is calculated as part of the Business Plan?	Yes, we would want to see how your per-student fee is calculated in this scenario.
4	*Relating to Financial Sustainability* • Is the lessor's investment value in the property a "source of funding"? • Is the taxpayer funding for the sponsor a source of funding? • Can some other expected/proposed sources of funding be outlined please?	We're not clear what you are asking regarding lessor's investment values. Could you please provide more context for this question? Yes, the state funding the sponsor receives is considered a source of funding. In this section, we want you to outline what funding you will be using and/or obtaining to operate sustainably (i.e., state funding plus other sources). We don't have an opinion on what this should look like or include as every sponsor and school will be unique.
5	Will the funding for Charter School sponsors be indexed to inflation?	This is being worked through, we will share an answer with you when we can.
6	Will the staffing component of the Charter School sponsor funding be increased to match increases in the State School Collective contracts?	This is being worked through, we will share an answer with you when we can.
7	For the seminar on the 18th can you please demonstrate a worked example of (let's say for 200 students initially) of: a. the funding available for establishment for a leased property. b. the funding available for sustainable operation as a 200 student school - including the property allocation able to be used for paying a lease.	There are a number of variables which mean that each potential charter schools' funding situation will be unique. We are developing the resources that will aid in calculating a funding package. We will be able to offer estimate calculations later in the process (this could be at the conclusion of stage one, or later in stage two).
8	Could you please direct me to how I can calculate the potential/estimated funding our proposed model will generate so that I can produce a budget for the application?	Refer above.

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9	In establishing a model for a learning support school where children qualify for ORs funding, could there be some clarification on what funding is available for such a model?	The funding rates exclude learning support funding. Refer in the application document to part 3d.b. Learning support will be provided based on the needs of the individual student and is excluded from the funding above.

Application content - various		
No.	**Question**	**Answer**
1	*Relating to Calls for Applications, pg. 5* The application notes that an individual could be a sponsor. With this in mind, could a small business create a governance structure across a number of trusts with key people in each community managing the operation of the school? Is this a model that you would be willing to consider?	There is flexibility in how you may set up your governance structure. Refer in the application document to part 2c.h - the drafted amendment to the legislation states that an application may be received from the following: a. A business or organisation defined as a body corporate, corporation sole, limited partnership, institution, or related entity (the proposed sponsor): b. In the case of a converting state school — a. the school's board with the support of a proposed sponsor; or b. one (1) or more members of the school community with the support of a proposed sponsor. In the scenario you have mentioned, we would want to ensure clarity is provided between the difference in the legal entity and the governance group. The legal entity enters the contract and has legally binding obligations for the school/outcomes.
2	*Relating to Testing viability and leadership, question "d"* Could you please clarify what you specifically mean by Communities of Interest?	By 'communities of interest', we mean the community that the proposed school will serve. This could be simply based on locality, or it could relate to the focus of the proposed school, such as sports, STEM for example.
3	*Relating to Business Plan, question "q"*	We have not stated a specific type of data we want to see as each school's circumstances will be different.

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	Could you please share the type of data you're expecting to see on current and forecasted student population?	However, using internally gathered data about interest and enrolments alongside publicly available data such through Statistics NZ would be a sensible approach.
4	For the questions for new schools on acquiring leases etc, would you like copies of the plan of the building or if we are going through resource consent do you want a copy of the application that is currently in? Or is it just enough to say this is in process?	The more information you can supply to us to support your application, the better. Each application will have its own unique circumstances, but please include any documentation that evidences what is stated in your application which will save us requesting it from you at a later date.
5	Could you clarify whether distance charter schools will be considered within this first round? Separate funding had been indicated as a possibility through media announcements.	Distance charter schools will be considered in this first round. There are no restrictions on the types of schools that may apply in this first round, but there are limited spaces available (50 schools). For a distance school, we would we need to know: • indication of distance • how this will be delivered and supported (domestic and international, distance in part or in full).

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Charter School Agency

Notifications for Applicants
Sponsors of Charter Schools | Kura Hourua

No. 2.0 **Date:** 19 July 2024

Drop-in Q&A sessions

If you didn't make the applicant briefing on the 18th of July, or you have more questions, join us online for Q&A sessions between 4-5pm on the following dates:

- Monday 22nd July between 4-5pm
- Tuesday 23rd July between 4-5pm
- Thursday 25th July between 4-5pm

You don't need to register to attend these – please use this link to join when you can between 4-5pm.

Microsoft Teams Need help?
Join the meeting now
Meeting ID: 433 221 281 489
Passcode: urdxB6

Please also keep sending your queries through to GETS until 31 July 2024 for us to respond and publish.

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Charter School Agency

Notifications for Applicants
Sponsors of Charter Schools | Kura Hourua

No. 3.0 **Date:** 19 July 2024

Applicant briefing slide pack

Please see the slide pack for the briefing held on 18 July 2024, attached to this GETS application notice.

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Charter School Agency

Applicant briefing

18 July 2024

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Charter School Agency

Agenda

Karakia and introductions	Chief Executive, Jane Lee
Welcome and thank you	
Application process	Executive Director, Bella Sutherland
Application content key topics	

- ‘Fit and proper persons’ test
- The first stage – purpose statement and business plan
- Funding entitlements for charter schools
- Property funding for charter schools

Next steps	Executive Director, Bella Sutherland
Questions and Answers	
Karakia, closing	Chief Executive, Jane Lee

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Charter School Agency

Welcome and thank you

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- For those we can not answer we'll take these away to respond and post on GETS.

Please keep asking questions, until 31 July, you can keep using the Q&A function on GETS to send questions through.

We are holding smaller online sessions that are Q&A focused next week where you will have a forum to ask questions in person.

Anything asked today and in future sessions will be published on GETS.

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Charter School Agency

Charter schools/kura hourua

Charter schools will support student achievement and attendance by providing more autonomy and flexibility in responding to their needs.

They will have greater flexibility in teaching, curriculum, governance, hours and days of operation, and funding, with the aim of achieving greater innovation in learning and increasing choice for students and parents.

In exchange for greater flexibility, they are subject to increased oversight and accountability.

We have funding to establish 15 new schools and convert 35 state schools in 2025 and 2026.

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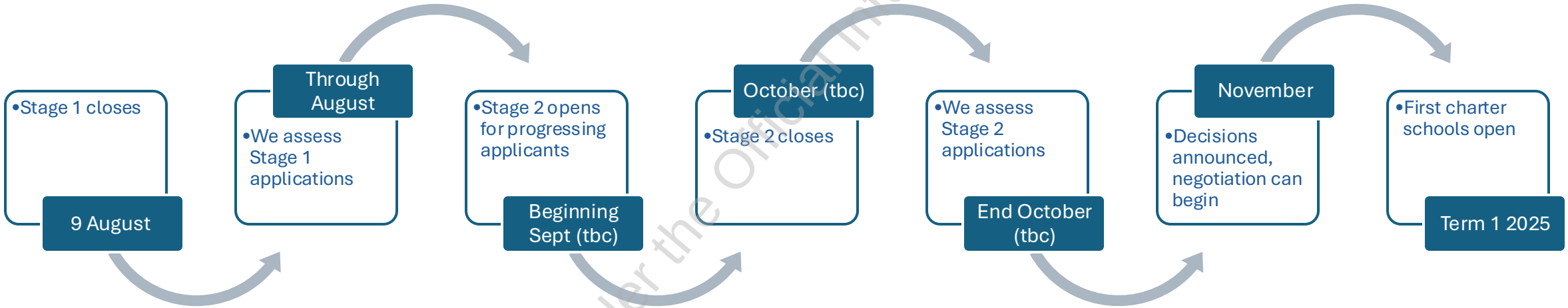
Charter School Agency

Application process



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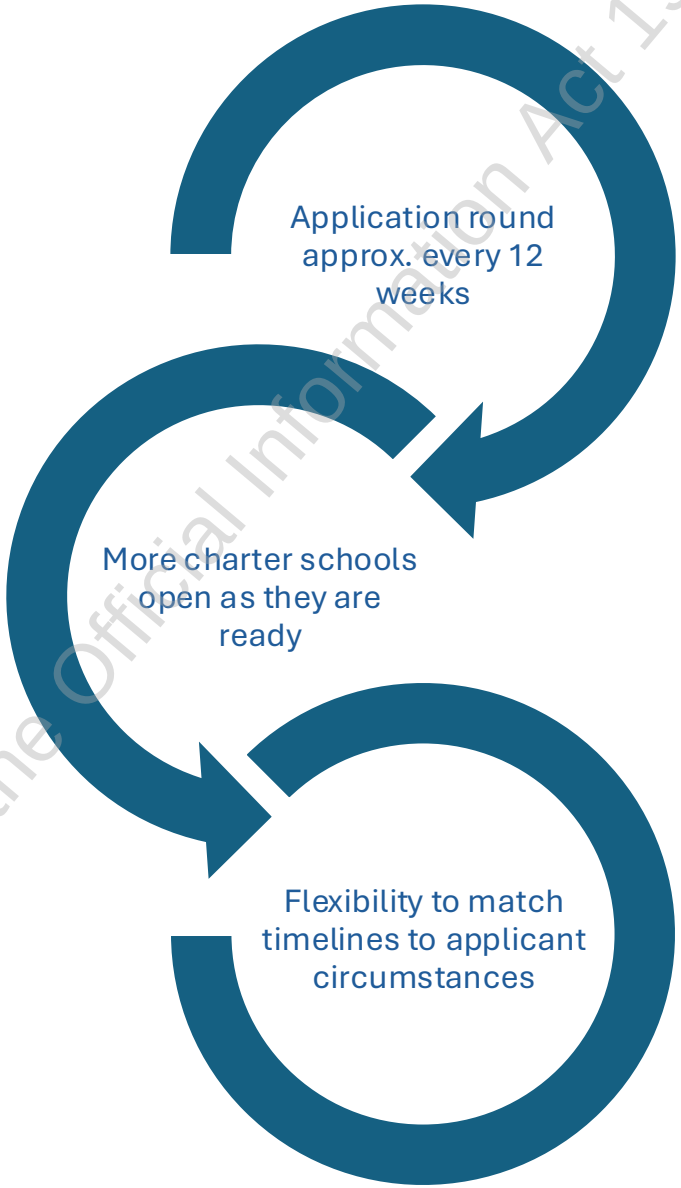
Rolling application process through 2025



Charter School Agency

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Charter School Agency

Fit and proper persons test

Demonstrate to us that your organisation and governing members are 'fit and proper' to operate a school

Statutory declarations must cover:

- Any convictions for fraud, bankruptcy or serious criminal activity
- Any bankruptcy or director/promoter prohibitions
- Any money owing to the Crown
- Any history of interventions in schools the sponsor or governing member has had a role in
- Any breach of statutory duties
- Any other relevant matters

The statutory declarations in the response form differ for the 'sponsor' and for 'governing members'. Please read these carefully to ensure you understand what we need to see.

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Charter School Agency

Purpose statement

Tell us about your vision for students and school

- Motivation and interest
- Aspirations
- Education strategy
- Supporting parental choice and innovation
- Opportunity for students

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Charter School Agency

Business plan

Show us you have a plan to deliver your vision

This is high- level, more detail is required at Stage Two

- Student achievement
- Student demographic and attendance
- Financial sustainability
- Workforce planning
- Context and environment
- Physical and cultural assets

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Charter School Agency

Funding entitlements

First principle – funding follows the child

Converting schools will receive:

- operational grant funding
- staffing-based funding
- services-based funding
- property-based funding

New schools will also receive establishment funding

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Charter School Agency

Funding scenarios (per annum)

Small converting primary	Roll: 36
Salaries	$270,000
Operations	$100,000
Services	$5,000
Total for converting	**$375,000**

Large converting primary	Roll: 525
Salaries	$3,100,000
Operations	$1,300,000
Services	$70,000
Total for converting	**$4,470,000**

Small converting secondary	Roll: 96
Salaries	$1,200,000
Operations	$400,000
Services	$13,000
Total for converting	**$1,613,000**

Large converting secondary	Roll: 1480
Salaries	$11,000,000
Operations	$4,250,000
Services	$200,000
Total for converting	**$15,450,000**

Small new primary	Roll: 36
Establishment	$160,000
Total for new	**$535,000 Y1**

Small new secondary	Roll: 96
Establishment	$425,000
Total for new	**$2,038,000 Y1**

- These figures are approximate and subject to change.
- Their representation is for the purposes of the stage one application only.
- Property funding is excluded from the above as it is still being developed.
- Specific discussions about funding will occur for stage two applicants in relation to your unique application.

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Property funding for charter schools

Charter schools will have one of the following property arrangements:

- Converting schools will occupy Ministry owned property
- New schools will occupy Non-Ministry owned property such as:
  - property owned and managed by a sponsor (State integrated schools or new schools), or
  - commercial leasing arrangements (most new charter schools).

Ministry-owned property	Non-Ministry owned property
Charter schools in Ministry-owned property will pay a nominal lease rate and will receive capital maintenance annual funding based on a stepped per-student funding model. The model will: • reflect the current capital maintenance and renewal of furniture and equipment funding for State schools • account for economies of scale.	Charter schools in non-Ministry owned property will be funded on a flat per student rate as an operating expense (as it is for State schools). The funding rates for furniture and equipment and the approach to capital maintenance funding for sponsor-owned property are broadly the same as for state schools.

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Charter School Agency

What happens next?

- Sign up for Q&A focused sessions next week Monday, Tuesday, Thursday.
- Send us any questions by midday Wednesday 31 July
- We'll provide responses by midday Friday 2 August
- Get your application in by midday Friday 9 August
- Expect to hear from us by Monday 2 September

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Charter School Agency

Time for questions

Ask us in the chat function now, or

Remember the deadline for questions closes 31 July 2024, so get your questions in before then through GETS.

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Charter School Agency

Notifications for Applicants
Sponsors of Charter Schools | Kura Hourua

No. 4.0 **Date:** 25 July 2024

Applicant briefing transcript

For privacy reasons, we have decided not to share the recording link.

However, please see the transcript of the recording (with slides) for the briefing held on **18 July 2024**.

Presenters / participants of the meeting were:

Jane Lee	Chief Executive, Charter School Agency
Bella Sutherland	Executive Director, Charter School Agency
Helen Saville	Principal Procurement Specialist, Ministry of Education
Simon Theeuwes	Senior Policy Manager, Schools Policy, Ministry of Education

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[Thursday 2:58 pm]	Meeting started
[Thursday 3:38pm]	Recording has started

Beginning of transcription

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Charter School Agency

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- Property funding for charter schools

Next steps	Executive Director, Bella Sutherland
Questions and Answers	
Karakia, closing	Chief Executive, Jane Lee

Session opened by Jane Lee, Chief Executive with karakia

Charter School Agency

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We are holding smaller online sessions that are Q&A focused next week where you will have a forum to ask questions in person.

Anything asked today and in future sessions will be published on GETS.

Jane Lee: Just to let you know, we are recording this session for our files. While this is our first session, please, please keep asking questions until the 31st of July using the question and answers functions on GETS. This is really exciting. We plan to hold more sessions because we know this is a particularly large group. There are folks that would like smaller online sessions. These are going to be Q&A focused next week where you will have the forum to ask any questions that that you would like to ask. Anything else today and in the future sessions will be published on GETS.

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Charter School Agency

Charter schools/kura hourua

Charter schools will support student achievement and attendance by providing more autonomy and flexibility in responding to their needs.

They will have greater flexibility in teaching, curriculum, governance, hours and days of operation, and funding, with the aim of achieving greater innovation in learning and increasing choice for students and parents.

In exchange for greater flexibility, they are subject to increased oversight and accountability.

We have funding to establish 15 new schools and convert 35 state schools in 2025 and 2026.

Jane Lee: The Charter school agency is the lever in the system that has the potential to support and raise student achievement and learning. It is by providing that autonomy and flexibility for schools, so that children can have their needs met. Charter schools will have their greatest effect in their ability teaching curriculum, governance and how you operate, but the aim of achieving innovation and increasing the choice for students, parents. In exchange, there comes a level of accountability and oversight which is extremely exciting. We have funding to establish up to 15 new schools and convert up to 35 state schools in 2025 and 2026.

Moving on to our next slide, where I am going to hand over to our Executive Director Bella Sutherland.

Bella Sutherland: I am going to hand this section over to Helen, but just before I do that, I am the Executive Director at the Charter School Agency here, and it is lovely to see you all today. I am going to introduce Helen from the Ministry of Education. She has been helping us run the application process and she is going to take us through the process steps between now and term one 2025.

Some of the detail around the application pack, we will restate that quickly but because you are here means that hopefully you have been able to download the application pack. Afterwards I am going to come back and cover a couple of areas for funding and property and any other questions that you put up. I am going to have a go at answering or certainly calling on some of my colleagues. We will be sending out the slide pack, so we will get that out to you at the end of the meeting.

Helen Saville: Thanks, Bella. Just wanted to check is anyone having any issues viewing the slides which are currently being shared or overall can everyone see the slides? I see a hand up. I will try sharing them again for you before I get started. Can you see that now?

Audience: Yes, we can.

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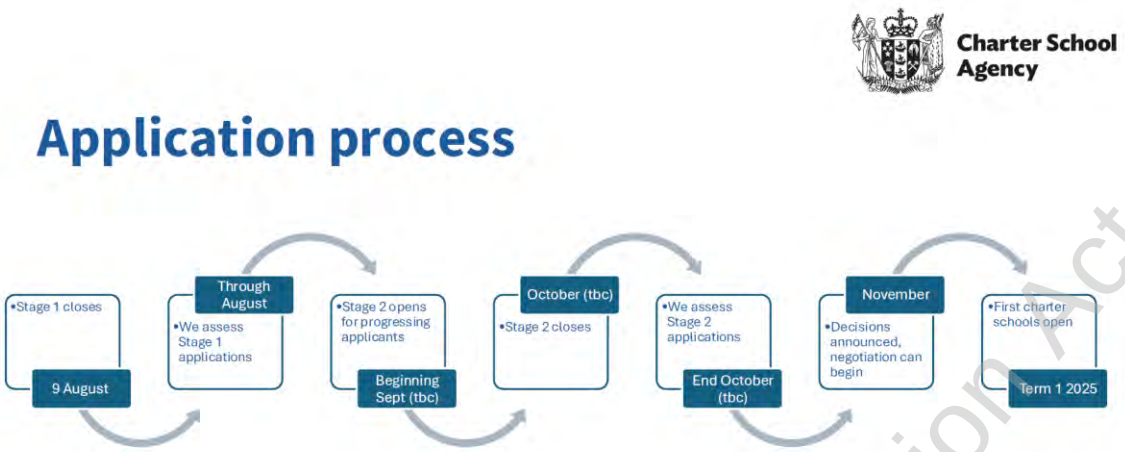

Helen Saville: Great. For this first stage we have that tight deadline of term one 2025, which is when we are going to start having [charter] schools open. This has been crunch time to work out how are we going to make the application process work for that time frame. This first round we are doing in two stages, we have determined that, stage one, we can start getting some things in order like the fit and proper persons test, your purpose statement, your business plan. We can start assessing those and seeing what applications are viable and then bringing those forward to stage two which is when we are going to ask you for more detailed information.

Stage one will close 9th of August and then we are going to have a couple of weeks' time preparing those applications to assess and determine who is going to go through to stage two. That is going to take us to the beginning of September which is around the same time as when the Bill is going to be getting pretty close to being passed. So, we are looking at around October for stage two applications closing and when the independent Charter Schools Authorisation Board will receive their statutory powers, which mean that they can approve applications. And then the Charter School Agency can start beginning [contract] negotiations [with potential sponsors] in November.

We're anticipating that we'll have some schools starting in term one 2025, but we do want you to let us know in your stage one application what your plan is, whether it is for term one, or if that is not feasible for you, and what you're thinking in terms of term two, term three, term four of 2025 or potentially 2026. We are going to start building a picture very early on of what school openings are going to look like over the next 12 months.

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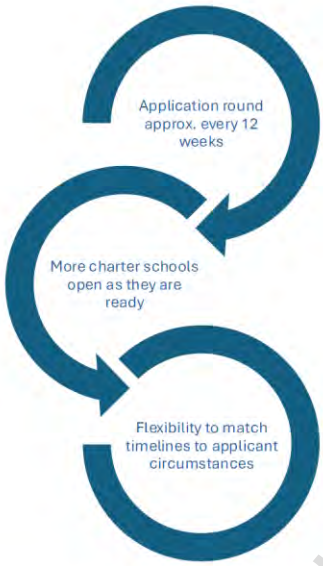
Charter School Agency

Rolling application process through 2025



Future state, what we want to get to is that we would have a rolling applications process. While this first one that we are doing is very much geared towards the term one 2025 date for schools to begin opening, we are thinking from next year onwards when we do future rounds that they will probably have some kind of cycle like a 12 to 15 weeks where applications will open, we will progress them, and then the next cycle will start again. We are anticipating that throughout the year there would be periods of time for more applications to come in depending on subscription levels, funding and network implications.

Charter School Agency

Fit and proper persons test

Demonstrate to us that your organisation and governing members are 'fit and proper' to operate a school

Statutory declarations must cover:

- Any convictions for fraud, bankruptcy or serious criminal activity
- Any bankruptcy or director/promoter prohibitions
- Any money owing to the Crown
- Any history of interventions in schools the sponsor or governing member has had a role in
- Any breach of statutory duties
- Any other relevant matters

The statutory declarations in the response form differ for the 'sponsor' and for 'governing members'. Please read these carefully to ensure you understand what we need to see.

So, moving on to the first bit of the stage one application which is the fit and proper persons test which is in the draft legislation as something that the independent Authorisation Board must consider in the applications. Looking across everything from monetary to serious criminal activity, any financial implications for the Crown, any prior interventions in schools. The important thing to note is in the application there are statutory declarations for the sponsor and also for any governing members that the sponsor organisation has. There are two separate forms for that. You would have one for the sponsor and as

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many as needed for the governing members. The term governing member is defined in the glossary that we supplied within the application pack.

Purpose statement

Tell us about your vision for students and school

- Motivation and interest
- Aspirations
- Education strategy
- Supporting parental choice and innovation
- Opportunity for students

Purpose statement: This is where we want you to give us a true sense of what your vision is for your school. We want to know why you want to have a charter school. We want to know what you want to achieve with your charter school. We want to know how that is going to fit in with an education strategy. We want to know how your community is going to be served by your school. Is the innovation there? Is there more choice for parents and families? And what opportunities are there for students at your school? We are looking for a robust purpose statement that is going to encompass all of those pieces.

Business plan

Show us you have a plan to deliver your vision

This is high- level, more detail is required at Stage Two

- Student achievement
- Student demographic and attendance
- Financial sustainability
- Workforce planning
- Context and environment
- Physical and cultural assets

The business plan: At this stage we are looking for a high-level business plan, so we are not looking for all the details that we are going to need in stage two. However, we are going to want at high-level information about how you are going to enable excellent student achievement and how are you going to cater to your

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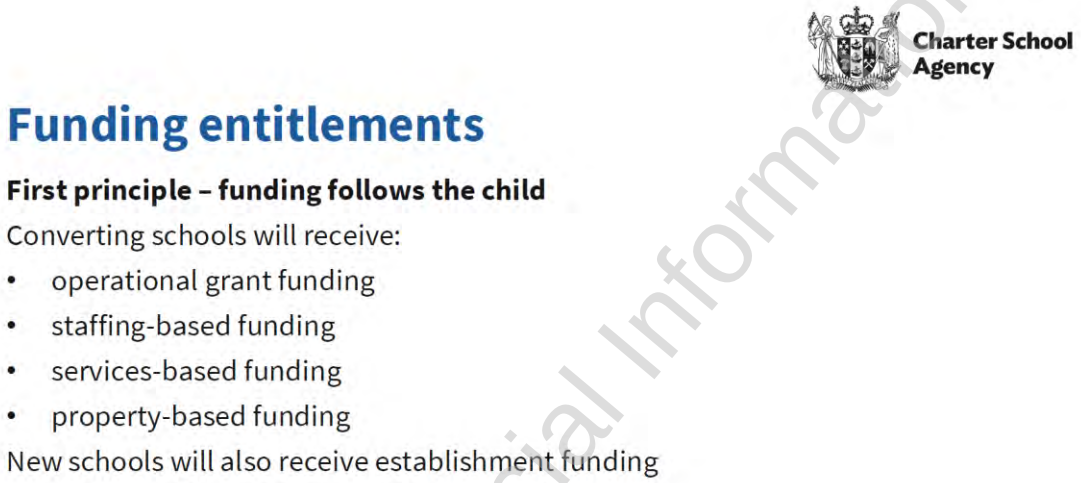
student demographic and manage attendance sustainably? How will you operate ongoing? What are your thoughts for your workforce planning? Have you considered the environment and the context around you in terms of your community? The need for a school, the want for a school. What existing schools are in the area, or if there is any regional kind of growth that is expected with population? Things like that.

With physical and cultural assets, we are talking more widely than infrastructure. So, for example, if you are proposing distance learning or an online learning or a focussed school of some description, what are the assets that you would need for your specific school? We want you to think carefully in that section more broadly than just infrastructure such as property; what do you need in terms of assets to deliver your school? And I am going to hand back to Bella to talk to funding entitlements.



Bella Sutherland: Oh, thank you, Helen. I am going to touch on funding and like to welcome some of our policy colleagues that are here. I might ask Simon to support me for the answering questions in this area. Our first principle is that the funding follows the child and that is supposed to be infused throughout the Charter School model.

As we said in the application pack, converting schools will receive operational grant funding, staff invested funding, service-based funding and property-based funding. The funding model is broadly equivalent to the state school model. New schools that are in that startup establishment phase will also get additional funding that will support that establishment phase in year one.

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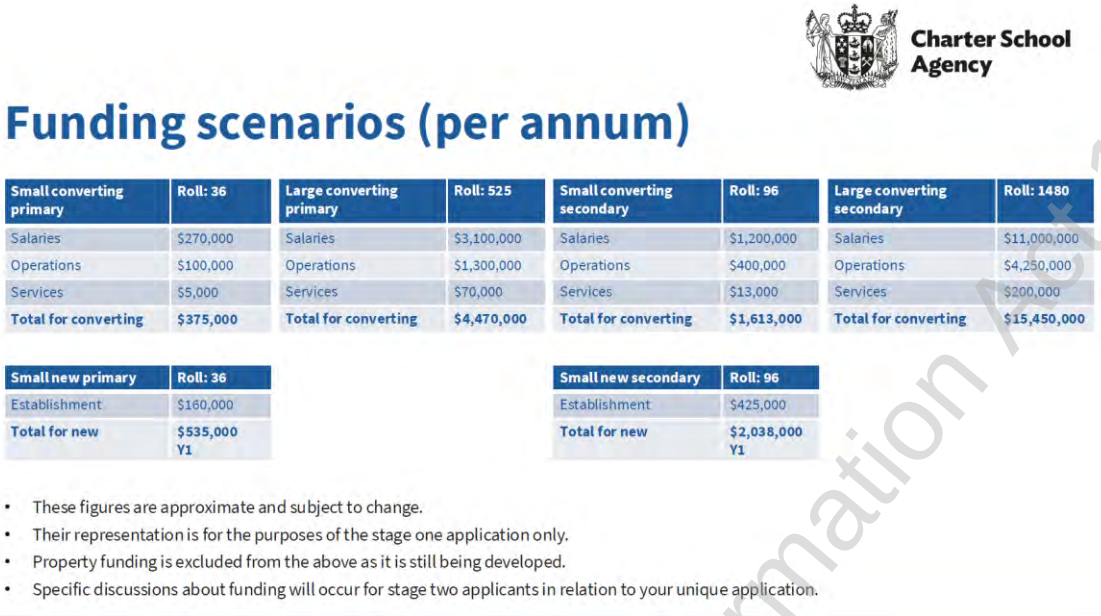

And then the second, if we move to the next slide, Helen, we have run some scenarios here. We have done a small converting primary school. This is the current state funded primary school role of 36. So, the total converting funding and there you can see comes from salaries, operations and services and would be the equivalent of $375,000. But if you look on the right-hand side for a large converting secondary school, again the components are the same salaries, operation and services. But the total for the converting large secondary school would be $15,450,000. And in comparison, we look at year one for a small new primary school. They get the establishment top up.

You will see the establishment top up there is $160,000, so they get the salaries, operation and services the same as the converting and then for year one they get the establishment funding, and it would be a total of $535,000. You will see similar with the small new secondary school; they get more proportionately with the establishment funding depending on student numbers. That example there is 96, so if you are a converting secondary school, it would be $1,613,000. Then with establishment for year one, it would take that to $2,038,000.

There are a few caveats at the end. We have run those through, but they are approximate, and they may change, but they will change around the margins, I think rather than substantially. The representation is for the purposes of stage one applications only, but we will get more funding information out to you.

Break for Questions

What if there are more people applying in 2025, is there more funding than 15.

Simon Theeuwes: Yes. The government has currently provided funding for the specific (up to) 15 and 35 schools, so 15 new schools, 35 converting schools. But it is up to it is up to cabinet to decide if there is going to be further budget initiatives done in future years.

When you say new school, is this a newly built school or is this a school that's starting from no students?

Simon: when we talk about new and converting school, we mean basically if it is a converting school then it is a school that transitions from the state sector as a state school or a state integrated school at the moment that will transition over to a charter school. When we talk about new school, it is newly designated school,

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not a conversion and not necessarily a new build. For the avoidance of doubt, 'new' does not relate to physical buildings - a new school could have an existing location already built but the school itself today does not exist.

Are salaries funded at the top of scale as in bulk funding?

Simon: what we have done is we have approximated the funding that the state sector currently gets through the staffing entitlement. We have looked at actual salaries rather than rather than the top of the band or mid or anywhere in the band and this means that it is basically approximated, but it is adjusted based on how much entitlement we provide to the state schools.

Does this get adjusted for equity index and isolation index?

Simon: All the funding is broadly equivalent to what the state sector receives. For example, in the state sector, we've got equity index funding and we've got isolation in funding. Via those same mechanisms, we will provide to charter schools and that part will be adjusted.

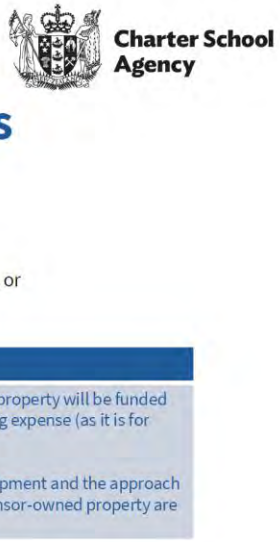
Are private schools considered a converting school or a school?

Simon: they will not be considered as a converting school, as only state and state integrated schools can convert to become a charter school.

What is the per student funding rate for intermediate and secondary students?

Bella: We will have to get back to you in writing about the per student rate for intermediate and secondary students. We are going to be putting out more information on funding.

One of the things that we are faced with is that legislation is still going through Parliament currently; Simon and the team are working on that. We don't have an Authorisation Board so some of these policy questions are still being answered. We will try to keep you up to date as much as we can as this develops. But there are a few things that are still going through. But all of the questions that come through we will put out written answers to and we will have in our discussion sessions next week as well. We will talk about property now.



Regarding property, charter schools will have one of the following arrangements; if they are a converting school, they will occupy Crown owned property. I am going to put a little caveat there because I know there is a number of schools that have different arrangements. They might be on property owned by iwi and other

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models. But the majority will be on Crown owned property and the new schools will occupy non Crown owned property such as a lease arrangement or they may own their own buildings.

For Crown owned property charter schools and will pay a nominal lease rate and will receive capital maintenance annual funding based on a step to per student funding model that reflects the current capital maintenance and renewal of furniture and equipment funding for state schools and account for economies of scale.

For non-Crown owned properties, charter schools where they own will be funded on a flat per student rate as an operating expense and the funding rates for furniture and equipment and the approach to capital maintenance funding for sponsored owned property are broadly the same. So that is how the property is going to work. There is a lot of complexity regarding property, and we know we need to get more information out to you about this and it is one of those policy areas that is still developing as we speak.

Break for Questions

What are the funding models for central local etc to support establishing charter schools?

Simon: is this referring to the establishment funding?

Audience: Yes. For new schools.

Simon: for new schools, there is a range of elements within the model, and it will be broadly equivalent to what state schools get for the establishment. It is quite similar.

Non ministry schools will essentially get policy one funding as in the integrated model?

Simon: yes, that will be equivalent to set integrated schools.

Is property funding over and above the funding mentioned earlier?

Bella: Yes, the funding mentioned earlier is the learning funding, student funding for achievement (operational grant funding, staff invested funding, service-based funding plus establishment funding for new schools).

Funding contracts are for 10 years. Sustainability is key mission in this section of the application. Is this guaranteed politically?

Bella: The contract with a Charter School is a 10 year binding document. We cannot control the political environment. However, an incoming Government would need to change legislation, contracts and offer in essence equal conditions. Any changes required would be worked through with the sponsors.

As an establishing school, we expect to grow our roll over time. How will this be managed - thirty students, first year, fifty students, second year'?

Jane: That will be managed through the funding so I think that we will do a wash up, so we will not disadvantage you as you grow your roll over the years, and we will manage that as you grow your charter schools. This is where the network will start to be considered as well as individual schools based on establishment and growth so funding can be allocated as required.

Simon: Yes. So just to add on that, so most of the components within the funding model is based on a per student amount. Depending on your roll, you will get more funding if you have more students; that is quite an essential bit of the funding model. It will grow as you grow is the principle within the parameters of network and funding availability.

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Is there a possibility that the 15/35 ratio of new/established schools could change? 15 seems like a very limited number?

Bella: Yes, that was a policy assumption the 15/35 split. The authorisation board must make decisions based on their criteria. That is our policy assumption rather than a fixed number which will need to be carefully managed in relation to the network and initial establishment.

Are closed state schools considered non-ministry?

Simon: if it is currently closed, then it would not be able to convert because it is closed already.

Does the board have areas where they have preferred charter schools and areas where schools are oversupplied?

Bella: I can categorically say no, they do not have preferred charter school areas. They have a criteria which you have in the application stage one, and it includes achievement, attendance and adding to parental choice. So, there isn't a preference by the board and the board haven't been appointed yet so we can be categoric around that. Are there areas where there is an oversupply? I think you will see that in the legislation, which submissions close on the 25th that we do have to consult as Charter School Agency. We have to consult with the Ministry on supply and they get to put advice to the Authorisation Board on those kinds of matters which means they will be considered, but they are not a key factor in their criteria at this stage.

Within the establishment funding there was scope to employ key staff before the opening date. How far in advance can the staff begin?

Simon: I checked in through the fact sheet. It is up to six months before the school opens.

Bella: Noting, that would be assuming you got approval six months before.

Simon: yes, in this in the first round, it is going be slightly different, but yes.

Would the Board consider an application to open multiple campus locations at once?

Bella: The Authorisation Board is enabled by the Bill if it goes through with no changes. That is still one of the pieces of the jigsaw. We don't quite know, but if the bill goes through with no changes, which allows the board to approve applications with multiple campus locations. However, in year one, there is still a little bit of policy work to do, and I think they may still be working through what one sponsor with multiple campuses would look like in some of the trade-offs (i.e., management of network and budget). We will come back to you with a written answer.

Will the ministry fund new schools for legal costs for providers, completing legal requirements relating to the school's establishment through the drafting and reviewing its Gazette Notice?

Bella: We do have two support entities that we're working with at the moment to bring to the charter school community. We're just working through how we can all work together as charter school agency and support entities. I think some of them are here today, so I would like to say a special welcome to them.

There will be support through those support entities and we are looking at legal costs at the moment because we know that it is quite a barrier, not only for new schools but also for converting schools with the employment contract. It's something that's under review at the moment and we will get information out to you.

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Charter school models call for more innovative approaches - not necessarily ratios for staffing that current mainstream schools have.

Bella: So that is absolutely correct, that is the model. I think that we've used the term cashed up, so once that we use the ratios to work out the amount per year that's cashed up and then the current intention is that quarterly to schools within that cash that you have autonomy and flexibility around how you use that funding. Simon, can you add to that?

Simon: yes, majority is flexibly used. However, property is slightly different, and we can provide further information on how property works, because we are still working on that policy, the funding policy side of things there in detail. But yes, majority will be.

We have heard that no new schools are being built under the charter schools model. Can you clarify what it means in relation to the 15 new schools?

Simon: The definition of a 'new school' isn't restricted to meaning newly built. The 15 new schools that can open will be responsible for finding and establishing their own property which could be property it owns, or lease arrangements. By 'new' we are referring broadly to a school that does not convert from a state or state-integrated school who with a sponsor, establishes as a charter school through a contract arrangement with the Charter School Agency.

What differentiates a private school to a new school? That will potentially have a sponsor. Private schools have sponsors. It is not very clear the policy on why a private school cannot actually apply for a charter school status.

Simon: the difference between a private school and a charter school is mainly around the legislation and regulations around, for example, being funded by the government, publicly funded and private schools are not, so there's different regulations still in place for charter schools vs private schools.

So, a private school cannot convert to a charter school?

Simon: When we say converting school, it is that process of a state, or state integrated school that is currently already being funded, it is shifting into becoming a charter school that is exactly the terminology that we mean when we say converting school.

Is there an opportunity for some additional funding for staffing if we are a specialist school?

Simon: Special schools are not able to convert according to the legislation. But if the question is additional funding for example, Māori medium students, etcetera, there is particular funding just like what we have seen the state sector that will provide extra funding for that.

Bella: We've got a lot of questions about private schools. I think what we will do is put out a special fact sheet on private schools to clarify that the complexity.

I believe there was an initial idea that the property funding component for new schools would not be included in the overall funding but would need to be added as a separate charge to families. Has this changed?

Simon: If it is non Crown owned property, they will also just like a state school, there is an opportunity for having property maintenance fees.

Is the specific additional funding for Māori or Pasifika students?

Bella: Yes, that is within the student funding and the makeup of the school, and the student makeup does affect and impact the funding.

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Jane: in terms of the special school, you talked about opening a school for Ongoing Resourcing Scheme (ORs) funded learners. We would possibly consider that is a specialist school which might be excluded. I am not saying that it is, but that we need to go back and clarify. That sits in the policy space, but it is a very good question.

Can we have more information about the two support entities. Who are they and what sort of help can they offer?

Bella: I am not going to name them today because we are still in discussions with them. I will get that out as soon as we have got our agreement in place. What kind of help can they offer? They're offering support across stage two of the application process, so the more detailed application aspects. They can then help through the establishment phase of charter schools or the converting phase and then they can provide support ongoing if it's required.

As to the kinds of support, it could be across curriculum, across employment, setting up your business plan. They can provide support across consultation, community consultation and. Like I said before we're still considering legal support if there is some support that we can give there as a whole to schools that are new schools and converting schools or how we can assist in that.

Is it possible to get a sample budget spreadsheet that populates funding?

Bella: Yes, that is our intention. We were hoping to have it ready for you today. There are a couple of policy decisions that are still being made, so you might get two; one for operating funding and one for property. We're probably going to do it that way because the property ones, the slowing us down a little bit.

The budget looks low compared to current state schools, for example, looking at the primary school with 525 students and the total salary budget is only 3.1 million. Does it include support staff?

Simon: every school is going to be case by case. It really depends on the situation, and I just want to note that the numbers that they're provided in the slides are based on a range of assumptions, so will differ based on each individual school.

As one of the original charter schools, this current funding around staffing is actually critical regarding the averaging and is a concern going forward. It's a really important transition piece that needs to be sorted out prior to schools converting.

Bella: Thanks, we'll come back to you on this point. It's picked up in some of the policy papers, but we'll come back to you on this one.

How about new online Charter schools? Will the establishment funds still apply?

Simon: we're still working through what it means for distance education. So that is still also a policy development that is still ongoing.

Do the funding rates in the example slide include or exclude GST.

Simon: will check and come back to you.

What was the minimum and maximum roll number that you are anticipating?

Simon: I do not think there is a specific role that we are after. Network and funding management will determine how this is established and grown over time to deliver for communities.

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Bella: I do not think there's minimums and maximums defined. This is an agile model. But you have to make your business case work, so that is going to come from your thinking around the population that you are serving and what your model is.

Obviously, we are doing a lot of work around predicted roles, but how are we going to get that figure established with the Charter School Agency because, if we are starting in the beginning of 2025, we will not exactly know. But we can make some good firm predictions. Could you elaborate on how that?

Bella: The contract negotiation process that happens after approval and through that process Jane would lead us and those contract negotiations around the estimated roll and where they're coming from and then we'll have to confirm that role size afterwards and we know there's going to be some unders and overs and we're going to have to work through that as we as we go. But it'll be part of that discussion and the contract negotiation.

I have a question just around property leases. We are working with two sponsor trusts, and they are looking at facilities to use for their students. We're trying to work on what can we charge per student? Is there a formula or is there a ceiling or we just have to justify it in our business plan?

Bella: Yes, it is up to you as the sponsors to put that case forward.

Is there an expectation that funding is provided by the school in addition to government funding? Or should the financial sustainability model be based 100% of government funding?

Simon: Charter Schools will not be able to set any fees except for property maintenance fees. There can be donations which they can take, and international students are another revenue source. So, there could be multiple revenue sources next to the state.

Bella: the business plan needs to make sense. When you look at international models is you know there is some that combined with vocational training and others, so every, every charter school I think is going to be slightly different. And I expect that there will be other revenue for some charter schools. So yes, we cannot charge fees, the model is not just based off the government funding.

What happens next?

- Sign up for Q&A focused sessions next week Monday, Tuesday, Thursday.
- Send us any questions by midday Wednesday 31 July
- We'll provide responses by midday Friday 2 August
- Get your application in by midday Friday 9 August
- Expect to hear from us by Monday 2 September

Jane: It is quite exciting space. Your questions have given us food for thought and that we will go away and

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commit to answering those and follow up on those and put them as Bella said to GETS for you. Keep asking those questions because actually that helps us with our model and what we need to achieve to support those that want to put an application forward. Send us your questions by midday Wednesday 31st July, we'll provide a response by Friday 2nd August, and we'll commit to catching up with some of those who want greater clarification about what they have asked. Get your applications in by midday Friday 9th of August.

Time for questions

Ask us in the chat function now, or

Remember the deadline for questions closes 31 July 2024, so get your questions in before then through GETS.

We look forward to those applications, because what you are doing is really supporting the system to drive out, drive up student outcomes for not only these students, but for folks - for family and whanau, which is really important. You can expect to hear from us by Monday on the 2nd of September. Next week we'll have Q&A sessions that you can pop into that will be Monday the 22nd, Tuesday the 23rd, and Thursday the 25th.

As the Chief Executive I'm feeling actually extremely privileged to be in this space. Having been an educationist for 34 years, I am deeply committed to this kaupapa, and the work and we will enjoy it as the Charter School Agency. We will consult and walk alongside each and every one of you as you think about putting in an application and so we look forward to a long term relationship with each and every one of you if you progress so, thank you for the time. This is not the last time that we will interact.

Ka kite.

Closed with karakia.

[Thursday 4:33pm] Recording has stopped

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Charter School Agency

Notifications for Applicants
Sponsors of Charter Schools | Kura Hourua

No. 5.0 **Date:** 25 July 2024

Your questions answered (Q&A)

Below are the questions we've received from you about the application to date. We'll be updating this section regularly as we receive and answer these.

Application process		
No.	**Question**	**Answer**
3	Was the 18th of July briefing the only briefing that you are holding, or will you hold more?	Yes, we will hold more based on demand. If you couldn't attend this event, please reach out via **applications@charterschools.govt.nz** if you are interested in attending another briefing.
4	How are you going to share information throughout this process?	Alongside publishing specific application Q&A, we will release factsheets for common questions and topics, available here for viewing and downloading: **https://www.charterschools.govt.nz/information-for-sponsors/** . We expect to have fact sheets up on ***property*** and ***funding*** shortly. These will also be available posted on the GETS notice.
5	What does it mean when it asks me to create a 'supplier account' on GETS? I'm not a business; I'm a school.	This is simply the terminology that GETS uses to classify who is providing a good/service. However, anyone can set up a GETS account, and in lieu of a business name or details, you can put your organisation or school details as you see fit. Please note that you will need a RealMe account to set-up your GETS supplier account. There is detail on the GETS site if you run into any issues: **https://www.gets.govt.nz/SupplierUserTenderHelp.htm**

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6	On the application form there are some questions where it's appropriate to attach a document that answers the question. Is there a preference regarding attachments and how they are best shared with you?	If you can, please respond with as much of your answer supplied written against the question with a reference to the supporting document. Links within the document or separate attachments such as PDFs are both acceptable ways to attach the document but remember that there is a maximum of 50mb for your file uploads, so often times a link is a better option than attachments.
7	Is this the only time that applications will be called for and from this groups that fulfil requirements will/may be approved up to the number and funding stated? What about a group wanting to apply for further schools in the future? We realise additional opportunity cannot be promised at this stage but if education structure is successful then in the future further opportunities may arise for applications. For example, if a group applies now for a school or maybe two but has a plan for developing further schools in a few years do they need to apply for them all now or just the imminent ones?	They only need to apply for the imminent schools. Any future schools will still need to be considered by the Authorisation Board closer to the time they are being established.
8	What do you mean by “open by 2025”?	By "open" we mean that students are attending the school, and classes are beginning.
9	Confirming that this is different to what opening for a state school means?	Yes, to meet with the model’s ambition of having students be able to attend a charter school from the beginning of 2025.
10	Can you provide more information about what the next stage entails?	There will be a more fulsome business plan, and your proposal would need to speak to your capability and the impact of the school on students and communities. We anticipate that there will be in-person interviews held alongside a written portion.
11	Can you give a rough estimate of timeframes for when the interviews would be for stage two of the application process?	We haven't committed to specific timeframes for the interviews yet, but we are anticipating that these would occur in October 2024.

Funding		
1	When will funding and property info be available to help with business plans?	Funding rates are being determined now and will be published when finalised as part of stage two of the application process. Factsheets about funding and property have been developed and are due to be released shortly.
2	Will there be funding for property leasing comparable to State school property funding?	Charter schools in leased accommodation will receive property-based funding at a per student rate. These will be published once they are

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	NB: Last time property lease funding was included in the bulk funding. Not to do so would be a major change and cripple the model before it starts.	finalised.
4	How much property funding will be included in the establishment funding?	New charter schools will receive funding to cover property costs for a period of time before they open, and some funding for furniture and equipment. Property funding rates will be published once they are finalised.
5	When the establishment funding will be provided. You cannot expect any sponsor to spend heavily with no support leading up to their opening.	Within the establishment funding, staff for new charter schools can be funded for up to 6 months before the school opens. The funding is flexible and based on the expected cost of a notional set of staff, similar to those employed in state schools prior to opening. Converting charter schools will not receive establishment funding, but they can be compensated for reasonable related expenses up to $30,000 per school.
6	Will charter schools be eligible for the school lunch programme? If no decision has been made yet, our preference would be to be bulk funded for this.	This has not been decided. It is still in policy development as to whether it will be accessible to charter schools and how this might work for converting students.
7	Does establishment funding include principals salary?	Yes, it does.
8	There is budget difficulty without knowing how many people in the community may opt in to your idea.	Showing a budget range in your application with a midpoint would be acceptable for stage one, noting that stage two will require more fulsome budget information. There is an expectation for stage two that you will undertake community consultation which will feed into your stage two application including budget.
9	How is funding for salaries calculated? What happens with higher paid teachers when they reach a certain point that they could become underfunded?	The funding for staffing is calculated on a per-student cash rate. Averaged expenditure based on many different types of school scenarios has been used to set per-student rates that are broadly equivalent to the state system.
10	Acknowledging the averaging calculation there is still the issue that funding could fall short - when will an answer come out for this?	Our funding factsheet due out this week should provide more detail in this aspect, but we welcome any further queries that you have in regard to staffing-based funding.
11	How will funding be established per child for the first year? We are doing all we can to establish an estimated starting roll number based on Expressions of Interest. However, it's a bit of a chicken and egg scenario in that we are awaiting authorisation and that impacts on	Funding for staffing in the first year will be based on an establishment roll (being the predicted Term 5 roll) agreed in the contract. After first year, it will be based on the per-student amount.

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	family's decision making when making a commitment to a new school.	While we have suggested that you could use a midpoint for the stage one application, through stage two more detail will be required for agreement in the contract.
12	The establishment roll also impacts on the lease. We are obviously leasing a property that caters for roll growth and this is a substantial cost. How will funding be allocated for property to enable roll growth.	Property funding will be provided on a per student basis. Sponsors will have both the flexibility and responsibility for determining how they will plan for and accommodate growth.
13	What happens if we exceed more students in year one than what we have agreed as the establishment roll?	We know that Year one will have unders and overs in regard to the establishment roll. There will be a roll return process. We will confirm back to you on the roll return process and when this happens.
14	With per student rate, how will it entice experienced teachers to the model? Are you looking at external sources of funding?	The model is very flexible, and it is up to you to decide if revenue is part of your application.
16	In a scenario with five new teachers who are top of the grade, will we get exact dollar values?	No. As above, we have looked at different scenarios to determine the per-student entitlement for charter schools in a way that is broadly equivalent to what state schools receive.
17	Regarding funding for staffing in extraordinary situations, state schools can access funding through the Ministry – will charter schools have this?	If you are referring to the additional relief teaching funding, the base for this is included in your operational grant funding. However, while you receive that initial funding, it's likely that charter schools won't have access to extra funding top-ups, but we can provide more information on this to you.
18	We anticipate that there will be legal fees to discuss the contract. Will there be funding provided for the negotiation?	We are looking at how the Ministry legal team can provide general legal information such as about the collective agreement and general terms and conditions. There is a range of support services to be provided to converting and new schools. We are defining these.

Learning Support		
1	Will ORS funding be exactly the same?	Yes, in terms of the funding amount. But the way it is received is different to state schools who receive it as a portion of the staffing entitlement. Instead, it will be a lump sum payment which is how private schools receive their ORS funding.
2	For ORS-funded children who have Ministry services like Speech & Language Therapists, or	Any learning support services that the Ministry currently provides will continue.

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	Occupational Therapy etc., how will this be factored into the funding?	
3	Who would we request this type of support through – the Ministry or the Charter School Agency?	We are working out how the interfacing will work between the Ministry and the Charter School Agency so that you only have to deal with one agency.

Property		
1	Can attendance dues be charged if a charter is leasing a property?	The proposed bill allows property maintenance fees to be charged if the sponsor owns the premises used by the charter school or the relevant integration agreement for a converting school in force immediately before the date of conversion allowed the proprietor of the State integrated school to charge attendance dues. It does not provide for a leasing situation outside of the above.
2	For undergoing a resource consent process for a new site that is fit for purpose, are there the same building compliance rules for Charter Schools to consider as with other schools? Could you please confirm if there are any particular building specifications or requirements that we must meet?	There must be compliance with all statutory and regulatory requirements as they affect school property regardless of ownership. Note, for converted schools there will also be compliance with certain Ministry design standards such as fire protection which can be higher than the law prescribes to protect the Crown's ownership interest which doesn't change when a state school converts to a charter school.
3	Has there been a decision on property rates for establishment, and does it include FF&E?	New charter schools will receive property funding including FF&E before they open, but details of this still being worked on.

Independent Schools		
1	Can an independent school convert to a charter school?	An independent school cannot convert to become a charter school. This follows the Coalition Agreement between National and ACT that agreed to State schools being able to convert. This is what Cabinet has approved. The Bill reflects this decision in the definition of "converting school" which "means a State school that proposes to convert to a charter school" (see clause 4, amendments to section 10 definitions).
2	Can an independent school become a new charter school?	An independent school could put an application in to set up a new school. The Authorisation Board will take into account the network and financial implications for the Crown when considering such an application.

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3	Do you think there will be a reconsideration for independent schools to be included in the charter school initiative?	See above.
4	If not, would/could our sponsor apply for a 'new' charter school with the same concept under a separate name in order to be considered?	There is nothing that prevents a sponsor with an independent school from applying to open a new school. The Authorisation Board will take into account the network and financial implications for the Crown when considering any application.

Enrolment		
1	In a situation where a charter school with special character had high demand, is the school able to prioritise enrolment of students from families with that special character? For example, in a religious school where there were 100 available spaces but 200 students who wanted to enrol, could the school employ a preferential enrolment scheme to ensure families of the same religion are selected first?	Yes. There is a new section 212T(2) of the Bill which allows a charter school with a character approved by the Authorisation Board to deny enrolment if a parent, or other person with responsibility of the education of the student, refuses to accept that the school operates with that character. This "character" is referring to "any religious, philosophical, or other distinguishing characteristics of the school" as notified in the Gazette when it is established (see new section 212M(2)(e)). This is regardless of whether there is an oversubscription. This is similar to the provisions for designated character schools (see section 204(5)), State integrated schools (see clauses 26, 27 of Schedule 6) and Kura Kaupapa Māori (see section 201(9)).
2	Is there an expectation such as a percentage of students from specific groups, i.e., Māori and or Pasifika students as with the priority learner groups in the last model?	That is not a characteristic of the model this time. The legislation is much more enabling to allow variety in the system, so there is welcome focus on seeing applications that reflect a community need or specific focus, but there is no expectation that rolls must meet specific criteria.

General		
	Can a trust run a charter?	Yes. A trust can be a sponsor of a charter school.
	There is implicit performance criteria requested in the high level business plan. When will performance management criteria be shared?	There are some key decisions going up to the Minister next week (week of 29th July), but we can assure you that there are no surprises with the fundamentals. We will try and get the framework out to you this week with the decisions still to be made highlighted.

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	10 years is a good contract timeframe. But there could be significant sector changes that could impact the funding model. Will this be built into the contract model?	Yes, policy will need to review the model over that time, and we need to be able to be transparent about that, and how we capture that in the review and renewal processes over the life of the contract.
	Can you give an example of what you mean by a cultural asset in the application response form?	Some examples of a cultural asset: In a kura kaupapa context, tikanga knowledge could be a cultural asset. In a faith-based context, specific tools and knowledge could be a cultural asset. In a Pasifika context, connections with community could be a cultural asset.
	Can Kura ā Iwi schools convert?	It is only specialist schools that can't convert, but Māori medium schools can.
	If specialist schools can't convert, can they apply as a new school?	Yes, they can apply to be a new school.
	Can you advise how the $153M is comprised?	Within the budget bid, a lot of it is departmental cost rather than funding going directly to new schools. In the case of converting schools, the first principle is that the funding follows the child. It's important to remember that the funding you receive is cashed up so that you can use it as you see fit. But charter schools do not receive more than other state funded schools; the funding is broadly equivalent so that all students in the state school network have equitable learning environments.
	If less than 35 state schools convert - will you increase the number of new charter school contracts?	This is for the Authorisation Board to decide.

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Charter School Agency

Notifications for Applicants
Sponsors of Charter Schools | Kura Hourua

No. 6.0 **Date:** 29 July 2024

Factsheets

Please see the factsheets for funding and for property, attached to this GETS application notice.

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Charter School Agency factsheet - funding model overview

July 2024

Charter School Agency

The charter schools funding model is based on five components in line with the State sector:

- **Operational grant funding**
- **Establishment funding**
- **Staffing-based funding**
- **Services-based funding**
- **Property-based funding**

- The model reflects: greater flexibility, broadly equivalent funding to State schools, funding that follows the student
- Charter schools cannot charge tuition fees and may operate for profit or not-for-profit.

Operational grant funding

- Charter schools will be provided operational funding based on per-student formulas.
- Some operational grant components that are not per student for State schools have been converted to a per-student rate. They include:
  - Base components
  - Funding based on a school's actual or historical usage
  - Funding based on teacher staffing entitlements
  - Funding for operational maintenance activity based on the actual area of the school.

Establishment funding

- New charter schools will receive financial support prior to opening in a similar mechanism to a new State school. Converting schools will not receive establishment funding, but they can be compensated for reasonable related expenses .
- For new charter schools, per-student establishment funding components will apply that approximates State school establishment funding. This includes components for:
  - Operational establishment funding,
  - Senior staff establishment funding,
  - Establishment funding for remaining staff.
- Senior staff for new charter schools can be funded for up to six months before the school opens. The funding is flexible and based on the expected cost of a notional set of staff, similar to those employed in State schools prior to opening.
- Meanwhile, funding for remaining staff covers up to a maximum of one term prior to establishment. This provides charter schools with a contribution to the cost of employing additional staff ahead of a school opening for instruction.

Property-based funding

Charter schools in Ministry of Education-owned property

- These charter schools will pay a nominal lease rate and receive property funding for capital maintenance funding which reflects the current capital maintenance funding for State schools.
- There will be a transitional period for providing this funding to sponsors of charter schools on Ministry-owned property.
- At least 70 percent of the capital maintenance funding for Ministry-owned property will be provided to sponsors in the form of capital funding to spend on Ministry-owned buildings, with the remaining converted to an operating expense and provided to Sponsors to incentivise them to be more efficient and to support the overall intent of the charter school funding model. However, sponsors will still have to meet terms and conditions set out in a contract between the Ministry and Sponsors for the management and use of Crown assets.
- They will also receive funding proportionate to the renewal component of furniture and equipment funding based on property funding for State schools.

Charter schools in non-Ministry-owned property

- These charter schools will be funded on a flat per-student rate as an operating expense.

Services-based funding

- Charter schools will be provided a per-student rate for some services that are provided to State schools. These rates are based on the estimated costs of services for State schools. These services include:
  - Digital services
  - Payroll services
  - PLD services.
- Other services will be provided to charter schools if they meet the same eligibility criteria as State schools:
  - Learning support services
  - Kaupapa Māori and Māori medium education services
  - School transport assistance.
- Sponsors will also be able to join the Ministry's Risk Management Scheme, a contents and liability insurance scheme funded by schools, subject to their acceptance by the Ministry of Education's re-insurer. Alternatively, they will be able to arrange their own insurance.

Staffing-based funding

- Charter schools will be provided with per-student funding for staffing to spend as they best see fit. The per-student rate has been approximated based on the value of staffing entitlement for State schools and varies with school type (primary, secondary, or composite).
- Schools will receive a higher rate for the first 100 students in a primary school or 200 in a secondary or composite school. This reflects "base staffing" in State schools while incentivising growth. A lower rate will apply to "additional students" (above 100 at primary and 200 at secondary or composite schools).
- Additional funding will be available for eligible charter schools for Māori immersion (Level 1-2) and Pacific immersion staff, and for learning support staff via the Ongoing Resource Scheme.

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Charter School Agency factsheet - funding model overview

July 2024

Charter School Agency

Operational grant funding

Funding for the day-to-day operating for schools

Funding Components

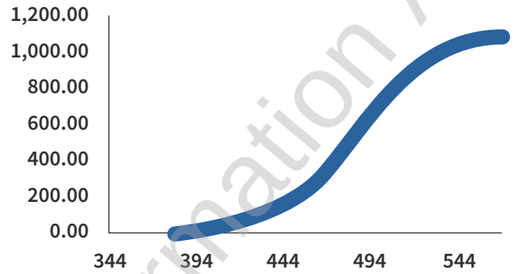
Operational grant funding is paid out in quarterly instalments. This funding is provided based on per-student formulas, generally calculated the same way as State school operational grants but with some exceptions. Operational grant components that are not "per-student" have been converted to a per-student rate. The table below gives the key funding components:

Funding Component	How is it funded?
Base funding	Rates differ based on school type. A per-student rate is applied until the maximum base funding is reached and then funding reduces as the roll grows until it reaches a fixed rate.
Equity funding (EQI)	Per-student rates apply to schools with EQI values above 379. Figure 1 shows the funding curve with rates.
Support for inclusion funding (SIF)	Per-student rates apply to all schools, increasing for schools with EQI values above 379. Figure 2 shows the funding curve with rates.
Careers Information Grant (CIG)	Per-student rates apply to all schools, increasing for schools with EQI values above 379. Figure 2 shows the funding curve with rates.
Heat, light and water funding	See table.
Relief teacher funding	See table.
STAR funding	See table.

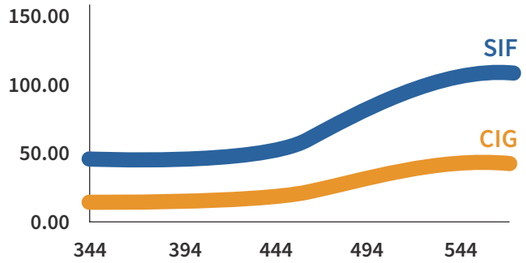
Funding Component	How is it funded?	
	Category	**2025 Rate**
ICT Funding	Base per-student (first 100)	59.19
ICT Funding	per-student	39.55
Kiwisport	Y1-Y8	15.55
Kiwisport	Y9-Y15	28.12
Māori Language Programme	Level 1	2,175.42
Māori Language Programme	Level 2	554.18
Māori Language Programme	Level 3	298.69
Māori Language Programme	Level 4	72.51
Pacific Bilingual and Immersion Funding	Level 1	1,135.53
Pacific Bilingual and Immersion Funding	Level 2	554.18
Support for inclusion funding (SIF)	Base per-student (first 100)	14.65
Targeted Funding for Isolation	Base per-student (first 100)	124.38
Targeted Funding for Isolation	Unit	1,615.70
Donations Scheme	Per-Student	163.50
Vandalism	Low Risk	3.84
Vandalism	Medium Risk	11.52
Vandalism	High Risk	19.23
Vandalism	Critical Risk	26.89
Vandalism	Extreme Risk	30.72
Vandalism	Not Qualify	-
Per-student	Y1-Y6	913.73
Per-student	Y7-Y8	1,020.74
Per-student	Y9-Y10	1,165.06
Per-student	Y11-Y15	1,288.92
Risk Management Scheme Premium	Per-Student	13.04

Funding component rates and figures

Equity Funding



SIF and CIG funding curve



Heat, light, water

Components	Primary	Composite	Secondary
Per student rate for first (100 in primary and 200 in secondary and composite) students	150.80	195.57	341.41
Per student rate for additional students	72.56	113.64	94.83

Relief teacher funding

Components	Primary	Composite	Secondary
Per student rate for first (100 in primary and 200 in secondary and composite) students	320.05	399.30	391.58
Per student rate for additional students	202.29	210.43	190.93

STAR

2025 STAR rates will be calculated in early September as they depend on the 2024 July Roll Returns

Components	Category	Rate
STAR funding	First 30 units	925.31*
STAR funding	Remaining units	162.60*

Additional funding components

Export Education Levy

- The EEL is calculated as part of operational funding. It consists of a variable component based on the tuition fees paid by international students. The variable levy is 0.0050 x Total tuition fees ($) collected by the school for international students.

Additional funding for non-Teacher Collective Agreement top-up costs per-student in school EQI rates

- Schools are provided with an additional increase to their operational grants to meet the costs of non-teaching staff pay increases. As current agreements end in 2024, 2025 rates will be adjusted once the new collective agreement is settled.
- An example of 2025 non-teacher top-up funding calculation: In 2025, if a primary charter school has 150 students with school EQI of 476, the funding will be calculated as follows: $1.15x476x100+$0.58x476x50=$68,544

		2024		2025	
School Sector	**Threshold**	**Threshold and below**	**Above threshold**	**Threshold and below**	**Above threshold**
Primary	100 students	1.15	0.58	1.15	0.58
Composite	200 students	1.26	0.63	1.26	0.63
Secondary	200 students	1.53	0.66	1.53	0.66

All figures and rates are GST Exclusive

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Charter School Agency factsheet - funding model overview

July 2024

Charter School Agency

Staffing-based funding

Funding for employing staff

- Charter schools receive higher rates for the first 100 students in primary schools, or 200 students in secondary or composite schools. This reflects “base staffing”.
- A lower rate applies to additional students above 100 in primary schools and 200 in secondary or composite schools.
- Rates in the table to the right provide the 2024 and 2025 staffing funding rates.

Entitlement Staffing Funding 2024

Components	Primary	Composite	Secondary
Per student rate for first (100 in primary and 200 in secondary and composite) students	6,621.94	9,434.67	11,786.12
Per student rate for additional students	4,986.09	5,638.98	5,951.36
Top up funding per student for Māori medium students	1,393.75	616.21	937.16
Top up funding per student for Pacific medium students	221.38	168.38	119.67

Entitlement Staffing Funding 2025

The 2025 rates will be adjusted once a new collective agreement is settled due to the teacher collective agreement ending in mid-2025

Components	Primary	Composite	Secondary
Per student rate for first (100 in primary and 200 in secondary and composite) students	7,117.98	10,091.64	12,503.92
Per student rate for additional students	5,359.59	6,031.64	6,313.82
Top up funding per student for Māori medium students	1,498.15	659.12	994.23
Top up funding per student for Pacific medium students	221.38	168.38	119.67

Services-based funding

Funding for services that are nationally provided for State schools

- Charter schools receive a per-student rate for some services that the Ministry of Education provides to State schools. This rate is based on the estimated costs that are centrally funded for State schools.
- Digital content, cybersecurity measures, and infrastructure management tools
- Payroll services that ensure compliance with collective agreements, relevant employment laws, and regulations
- Most nationally provided PLD services
- Other services will be provided to charter schools if they meet the same eligibility criteria as State schools:
  - learning support services
  - services for Kaupapa Māori and Māori medium education
  - school transport assistance.
- Sponsors may opt to join the Ministry’s Risk Management Scheme, a contents and liability insurance scheme funded by schools, subject to their acceptance by the Ministry’s re-insurer. Alternatively, they will be able to arrange their own insurance. This rate is given in the operational grant component page.

Service	Per-student
Payroll	46.62
Nationally provided PLD	12.53
Digital	76.56
Total per-student rate	135.71

Establishment funding

Funding to support new charter schools prior to opening, including setting up their school and employing a principal and other staff

- New charter schools will receive financial support prior to opening in a similar mechanism to a new State school. Converting schools will not receive establishment funding, but they can be compensated for reasonable related expenses .
- For new charter schools, per-student establishment funding components will apply that approximates State school establishment funding. This includes components for:
  - Operational establishment funding,
  - Senior staff establishment funding,
  - Establishment funding for remaining staff.
- Senior staff for new charter schools can be funded for up to six months before the school opens. The funding is flexible and based on the expected cost of a notional set of staff, similar to those employed in State schools prior to opening.
- Meanwhile, funding for remaining staff covers up to a maximum of one term prior to establishment. This provides charter schools with a contribution to the cost of employing additional staff ahead of a school opening for instruction.

Operational establishment funding per-student rates by school type

Per-Student Rate	1-199	200+
Primary	2,102.61	1,100.35
Secondary	2,387.17	2,030.09
Composite	2,229.09	1,683.82

Establishment staffing per-student rates for senior staffing roles

Per-student rates only apply for the first 200 students on the establishment roll

Proposed funding of roles	School type	Per-pupil
Senior Management (deputy/ Assistant Principal)	Primary	290.22
Senior Management (deputy/ Assistant Principal)	Secondary/ Composite	303.16
Senior Heads of Department	Secondary/ Composite	285.04

Establishment staffing per-student rates for remaining roles for Q4 2024

School Type	Rate
Primary	1,184.20
Secondary	1,413.45
Composite	1,339.26

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Charter School Agency

Charter School Agency Factsheet - Property

July 2024

Charter School/Kura Hourua property arrangements

Charter schools will have one of the following property arrangements:

- Converting schools will occupy Ministry owned property.
- New schools will occupy non-Ministry owned property such as:
  - property owned and managed by a sponsor), or
  - commercial leasing arrangements.

Charter schools in Ministry-owned property

Charter schools in Ministry-owned property will pay a nominal lease rate and receive property funding for capital maintenance funding which reflects the current capital maintenance funding for State schools.

There will be a transitional period for providing this funding to sponsors of charter schools on Ministry-owned property.

- In the first year property funding for charter schools in Ministry-owned property will be comparable to the capital funding budget allocated to schools, and increase over the following four years to be broadly equivalent to the total expected value of maintenance and renewal funding of similar State schools.
- Throughout this period, the sponsor will take increasing responsibility to manage and maintain the buildings that they occupy, with further recourse to the Crown decreasing to nil.

At least 70 percent of the capital maintenance funding for Ministry-owned property will be provided to sponsors in the form of capital funding to spend on Ministry-owned buildings, with the remaining converted to an operating expense and provided to Sponsors to incentivise them to be more efficient and to support the overall intent of the charter school funding model.

- However, sponsors will still have to meet terms and conditions set out in a contract between the Ministry of Education and Sponsors for the management and use of Crown assets.
- They will also receive funding proportionate to the renewal component of furniture and equipment funding based on property funding for State schools.

Charter schools in non-Ministry-owned property

Charter schools in non-Ministry owned property will be funded on a flat per-student rate as an operating expense.

- The funding rate for charter schools in sponsor-owned property will be based on the approach for capital maintenance funding for State integrated schools (Policy One). Find out more about Policy One on the Ministry of Education website.
- The funding rate for furniture and equipment for charter schools in non-Ministry owned property will be based on a per student funding rate of the renewal funding provided to State schools.

Decisions are still being made on whether there will be different funding rates for different non-Ministry-owned property arrangements.

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www.charterschools.govt.nz

email info@charterschools.govt.nz

Charter School Agency factsheet - funding model overview

July 2024

Charter School Agency

Examples

- We have provided six examples of charter schools with different school types and sizes:
  - Small primary school, secondary school, and composite
  - Large primary school, secondary school, and composite
- Under each example, we have assumed:

EQI value	486
Isolation Index value	0.6
Donations scheme eligibility	Yes
Vandalism eligibility	No
Risk Management Scheme	Yes
Māori Medium learners	20%
Pacific learners	0%
New charter school	Small schools only

Features of funding

Establishment funding
Only for new schools

Staffing-based funding

Services-based funding

Operational grant funding

Total funding for each converting charter school examples

Option 1: Small new primary

Roll: 36

Component

Salaries funding	$268,232
Operational funding	$122,118
Services	$4,886
Establishment	$159,327
Total	**$554,563**

Option 2: Small new secondary

Roll: 96

Component

Salaries funding	$1,219,267
Operational funding	$451,782
Services	$13,028
Establishment	$424,517
Total	**$2,108,593**

Option 3: Small new composite

Roll: 36

Component

Salaries funding	$366,595
Operational funding	$154,316
Services	$4,886
Establishment	$169,928
Total	**$695,724**

Option 4: Large converting primary

Roll: 524

Component

Salaries funding	$3,138,574
Operational funding	$1,433,248
Services	$71,112
Establishment	$0
Total	**$4,642,934**

Option 5: Large converting secondary

Roll: 1,481

Component

Salaries funding	$10,883,080
Operational funding	$4,800,161
Services	$200,987
Establishment	$0
Total	**$15,884,227**

Option 6: Large converting composite

Roll: 1,551

Component

Salaries funding	$10,337,127
Operational funding	$4,674,174
Services	$210,486
Establishment	$0
Total	**$15,221,787**

Caveats:

- Funding information and examples provided are indicative and only for illustrative purposes.
- These examples do not include other components of school resourcing which are still being developed (e.g. property funding).
- Examples apply a number of assumptions regarding factors like roll distribution (by both year level and immersion level), isolation index, Equity Index, Donations Scheme opt-in etc. These factors all differ based on each individual school and will impact the estimated level of funding provided.
- Establishment funding: This applies to new charter schools only. Converting charter schools do not receive funding. It is unlikely that new schools will open with large rolls.

All figures and rates are GST Exclusive

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Charter School Agency

Notifications for Applicants
Sponsors of Charter Schools | Kura Hourua

No. 7.0 **Date:** 07 August 2024

Your questions answered (Q&A)

Below are the questions we have received from you about the application to date. We will be updating this section regularly as we receive and answer these.

No.	Question	Answer
1.	I read somewhere that whānau had to agree to a school converting. What's the % of support required from whanau?	The Authorisation Board must consider "the level of support from community, staff, students, and whānau for the proposed sponsor and new or converted charter school" but there is no specific percentage of support required. Your application in stage two will need to address what community consultation you have engaged in and the outcome of any consultation for the Authorisation Board to consider the level of support they believe your application shows.
2.	We are considering converting back but are also in the middle of our Build programme planning (i.e. construction has not started). Can we apply to convert and still expect the build to proceed or not	All Crown funded capital projects would need to be assessed according to their individual circumstances. There is nothing preventing you from submitting an application, but there is no guarantee that can be made with regard to whether Ministry property projects will continue if a school converts.
3.	What is the average estimated per student funding per year for a primary, intermediate and secondary student	Funding rates are being determined now and will be published when finalised as part of stage two of the application process. Factsheets about funding and property have been developed are and released.
4.	What is considered to be establishment activities ?	Establishment activities are any activities that would occur after you have negotiated your contract in order to open and operate as a charter school. This would include setting up school governance, operating policies, day-to-day running of services.

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5.	New schools that are non-state will receive the same funding for start-up?	Establishment funding is calculated at the per-student rate and will be provided, as long as the total amount does not exceed the amount of establishment funding a State school of similar type and size would receive.
6.	Is there scope for composite schools? Y0-13?	Yes, there is scope for composite schools.
7.	Will there be regional adjustments to property to reflect different costs?	No, it is a flat rate.
8.	Can new schools lease empty classrooms from integrated schools?	Any leasing arrangements are at the discretion of the sponsor.
9.	Are the funding rates inclusive or exclusive of GST?	The funding rates supplied in the briefing are GST exclusive.
10.	Are closed state schools considered non-ministry.	Yes. In the context of charter schools, a closed school cannot convert.
11.	Would there be funding for boarding/accommodation block?	Property funding would apply to all blocks /buildings on the site that are within the lease arrangement.
12.	Would the Board consider an application to open multiple campus locations at once?	There is further policy work to be done regarding one sponsor with multiple campuses. The Authorisation Board would need to take into account the network and financial implications for the Crown when considering such an application.
13.	Will the Ministry fund new schools for legal costs for Providers to complete their legal requirement relating to the school's establishment through to drafting and reviewing its Gazette Notice?	There may be some legal support provided through the Charter School Agency, however, we would expect that sponsors engage their own independent legal support as best practice.
14.	Will we be able to use property funding for other than property?	At least 70 percent of the capital maintenance funding for Ministry-owned property will be provided to sponsors in the form of capital funding to spend on Ministry-owned buildings, with the remaining converted to an operating expense and provided to Sponsors to incentivise them to be more efficient and to support the overall intent of the charter school funding model.
15.	Will schools be able to advertise for staff in the gazette before final approval?	There is nothing that prevents you from doing so, but it would be at the risk of the applicant to do so prior to having statutory authorisation board to approve schools to open.
16.	Does the teaching salary rates take into account indexes e.g. pay equity rates?	Yes, this information is now displayed in the Funding Factsheet.
17.	How about new online charter schools? Will the establishment fund still apply?	There is further policy work to be done regarding distance learning and the funding that is available to them.

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18.	Can you also provide a fact sheet for new specialist schools?	We will not be releasing a factsheet at this time but note that the Q&A have a lot of questions that cover specialist schools. Specialist schools who progress to stage two will have the full opportunity to discuss their unique application with the Charter School Agency.
19.	Would you attach therefore a relationship type role per charter school starting up to assist?	State schools have governance facilitators - is that what you are referring to? Charter schools will be supported by the support entities flexibly in a way that best works for them over the stage two application process, establishment and ongoing when they are open.
20.	The total salary budget that is on the briefing slide looks low compared to current state schools - does it include all support staff, admin, and units?	The funding rates supplied in the briefing were a specific example to give you an initial idea. There are a lot of variables based on each school's unique situation which will be discussed with applicants at stage two.
21.	Fees for property in a new sponsor school - can that be set by lease rates to vendor?	Property funding will be set through a consistent model.
22.	If a school were considering multiple sites applications - would that be one or multiple applications. If one sponsor applied for multiple sites and was successful - is that counted as one or multiple new schools of the 15 new schools.	This would be multiple schools. The Charter School Agency will negotiate separate contracts for each site with the sponsor. Whether the sponsor wants to include in a single application or multiple application is a choice for them. Your application for stage one should be for the school/s that you are proposing to open in 2025 / 2026. Future schools would need to be applied for an approved by the Authorisation Board closer to their opening and would need to be considered based on network and Crown financial implications.
23.	It will cost money to lease or purchase a facility - how high can the sponsor set the property fees for students?	The fee must be paid at the rate, and subject to any conditions, specified in the charter school contract.
24.	Is it possible to start with yr. 1-13?	Yes, if your school is a primary, secondary or composite school, you are able to determine the year levels you teach and your roll. The authorisation board would consider the network and Crown financial implications so we would expect your application to outline your plan for growing your roll.
25.	Is there funding to support a sponsor hapu who have not participated in establishing a Charter school before and what are establishment criteria?	All sponsors will be able to receive funded support from our contracted support entities to help them with their stage two application, establishment and ongoing needs. This will be shared with applicants in stage two.

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26.	Do we have to start as either primary or secondary?	Yes, the legislation enables for either a primary, secondary or composite school to open at this time.
27.	Can property fees be charged in a lease situation, or only where the sponsor owns the property?	The proposed bill allows property maintenance fees to be charged if the sponsor owns the premises used by the charter school or the relevant integration agreement for a converting school in force immediately before the date of conversion allowed the proprietor of the State integrated school to charge attendance dues. It does not provide for a leasing situation outside of the above.
28.	For a new school how does it work with Authority to Assess with NZQA with units standards and achievement standards?	Are you referring to the Consent to Assess process? In the drafted Bill, there have been no amendments to the Act in respect of section 449, 'consent to assess against standards'. Depending on which nationally and internationally recognised secondary qualification system you intend to use, you would need to comply with any specific guidelines and procedures to assess against that system.
29.	With a Sponsor taking on a converting school, how does that work with staff, i.e. principals?	For a converting school, employees (including staff principals) will transfer on conditions that are no less favourable.
30.	The 'funding' slide presented at the Teams meeting of 18 July suggested that the Salaries/Operations/Services funding for a small secondary charter school of 96 students would be 1.6 million dollars per annum – is this correct?	Further funding information has been made available, but please also remember that the estimates we gave you had a number of variables applied to them. In stage two, applicants who progress will be able to firm up the funding that is available to them for their unique application.
31.	We are a converting school. We do not have a sponsor as such. 1. We have the approval of our BoT to proceed, so who is the sponsor, is it the BoT and Principal? 2. Are there sponsors who are looking for converting schools to sponsor and if so, can we be put in touch with them? 3. Ten years is a long time. What would happen if the Principal wanted to leave and is part of the sponsor team i.e. (BoT and Principal)? 4. Ten years is a long time. If a new BoT and new Principal came to our school and decided they did not want to be a charter school anymore, is there a process they would take to not be a charter school anymore or would our school have to close (and then be re-opened as a state school).	1. A sponsor has to be a body corporate, corporation sole, limited partnership, institution, or related entity. The Bill defines who may apply in the case of a converting State school as: (i) the school's board with the support of a proposed sponsor; or (ii) 1 or more members of the school community with the support of a proposed sponsor. 2. At this early stage, we do not have a view on how many applying sponsors and converting schools we have. We will know more when Stage One closes and will facilitate any connections between sponsors and converting schools. 3. This would be an individual employment issue (between sponsor and principal). If the principal is part of the sponsor as the legal

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		entity, this is a commercial issue for the sponsor as a legal entity. 4. Yes there will be a process to close and/or convert a charter school based on the circumstances and commercial arrangements i.e., contracts with the Charter School Agency and employees.
32.	In the prior Partnership Schools model, it was reported that some schools were massively over-funded for the first rounds. It would be useful to have information that we can share that is factually representative.	The close-out reports are publicly available to view also noting that everything shared via our website charterschools.govt.nz is factual and we will continue to be transparent with the information that we share.
33.	New schools leasing buildings will be aiming to use buildings that can fit their maximum capacity which needs to be taken into account for the funding model? E.g. aiming for total roll of 250 students but may start with 60-100. So, we will be paying more for property right from the beginning.	We expect to see in your application how you intend to grow your roll year by year and how you manage your property to best meet the needs of an increasing roll is at your discretion.
34.	Currently, we only have an approximate indication of revenue per student, based on the example Charter School funding models that were shared in the information presentation. 1. Do you have any further information regarding the funding rates, including property funding rates for a new school, with the school property/buildings being leased? 2. How will the funding structure work for daily student transport to and from school? For example, are bus fares paid for separately by families or is the bus system funded centrally? This also led to me considering whether there would be school zones for charter schools, like state schools have. If so, would this affect the transport system/funding?	1. Funding and property factsheets have now been released. The rates are expected to be released in stage two of the application process. 2. Students at charter schools will be able to use state school transport options. Charter schools are not subject to any enrolment schemes and do not have enrolment zones.
35.	I am seeking information about the per-student funding rate Charter Schools will receive. I understand this will be the same as current State Schools and require this figure to provide an accurate financial forecast for stage one. Are you please able to provide this information?	Funding and property factsheets have now been released on GETS. The rates are expected to be released in stage two of the application process.
36.	Is it best to establish our charter school by starting a Trust or would you recommend another model? Secondly, does this process need to be complete by August 9th in order for our application to be accepted or would it be ok if the process is underway?	The form of the charter school sponsor has to be a legal entity. There are pros and cons of all legal forms including Trusts. The form is a decision for the Sponsor, and we recommend that you seek advice on from an expert such as a lawyer.

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		The process of establishing the legal form does not need to be completed by 9 August but preferably you will have decided on what legal form the sponsor prefers including a timeline for establishment.
37.	We are a RTLB Lead School what happens here if we convert to a Charter School.	The decision has been made that RTLB cannot be a lead school within the charter school model. They are not included in the definition of a 'converting school' agreed in the Coalition Agreement between National and ACT.
38.	Would we still be able to access MoE regionally allocated PLD that becomes available yearly? Has PLD been factored into the charter school model?	Yes PLD has been included in the funding model as part of the cashed-up Services-based funding. This means the funding will be made directly available to the Charter School to facilitate.
39.	Is it possible to get a high level budget outline for a Year 7-13 school of 200?	Funding rates are being determined now and will be published when finalised as part of stage two of the application process. A factsheet about funding has been developed and released.
40.	What is the estimated anticipated funding per head for secondary students at a Charter School moving forward?	Funding rates are being determined now and will be published when finalised as part of stage two of the application process. A factsheet about funding has been developed and released.
41.	For a residential education program using kitchen facilities, if the kitchen is not up to commercial standards or the ablution block does not meet Ministry standards, is it the sponsor's responsibility to upgrade these facilities, or would charter school property funding cover these costs? Additionally, who can assist us in determining the residential standards for a school regarding ablutions, kitchen, and dining facilities? Will the Ministry visit to assess standards?	There must be compliance with all statutory and regulatory requirements as they affect school property regardless of ownership. It is the responsibility of the sponsor to determine and maintain in accordance with their contract with the Charter School Agency. While for converted schools there will also be compliance with certain Ministry design standards for new charter schools, the same level compliance may not apply. More information will be shared in stage two. We anticipate that an independent Support Entity function will be available in stage two to assist applicants to navigate requirements such as property.
42.	For a residential program that requires overnight funding for staff, how will the government calculate staff funding for our	All funding is based on a per-student rate within the five elements of establishment, staffing, operational grants, services, property. How you use your entitlements flexibly within each of the

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	school? Will funding still be based solely on a per-student basis?	elements is at your discretion, noting that it is within your remit to determine whether your proposal includes other revenue streams to operate sustainably.
43.	With the secondary qualification system, is there the possibly of partnering with a tertiary provider?	The legislation requires that the secondary qualification system be nationally and internationally recognised, but other than that, it is up to you what you propose.
44.	Can exam fees be charged? Can parents pay these fees?	Charter schools cannot charge domestic students a fee for enrolment, attendance, the delivery of the curriculum. As well, the Bill does not cover the inclusion of charter schools in the Donations Scheme which means that schools cannot seek or receive solicited voluntary payment from parents except for overnight camps.
45.	Can we charge for resource consumables for things additional to curriculum delivery.	Charter schools cannot charge domestic students a fee for enrolment, attendance, the delivery of the curriculum. As well, the Bill does not cover the inclusion of charter schools in the Donations Scheme which means that schools cannot seek or receive solicited voluntary payment from parents except for overnight camps.
46.	If you apply to be a specialist school, do all the children have to be ORS-funded to attend. Be great to understand if we should be applying as a specialist school or other.	The model is flexible, and enrolments are open to all, so the specialist school would not have to have only ORS-funded children. These kinds of clarifications can be better worked through if you are invited to progress to stage two.
47.	Is there a performance framework factsheet?	There is further information coming on performance management which we hope to share with you soon.
48.	Does the legislation apply to ECEs?	ECEs cannot convert - the Bill is for primary and secondary schools to establish as charter schools. However, there is nothing that precludes a sponsor of an ECE provider from sponsoring a primary or secondary school.
49.	Are there guidelines on governance of charter schools?	No. The Bill is clear on who can be a sponsor and who can put forward an application, but the rest is up to you to propose to us in your application.
50.	If we are starting with year's 9-11 but intend to expand, what do we put in the application?	We expect to see in your application how you intend to grow your roll year by year, but this is not locked in at this stage.
51.	Are there any guidelines on what property is suitable for a new school?	Not of which we are aware. The overarching principle would be that the students are safe, and the property would need to meet all statutory and compliance measures as with any school property.

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52.	For a proposed rural school, can charter school students access ministry transport services?	Yes, they can.
53.	In state schools, 'open for instruction' vs 'open for teaching' is quite different. When considering the timelines for recruitment and receiving establishment funding, there would often be a time frame where staff begin to be employed but students are not being taught - is that not the case? Will there be a governance facilitator like with state schools?	While the establishment funding allows for staffing ahead of opening, the intention is that by 'open' that Charter School Agency is asking you if you will have students enrolled and ready to start school to learn on day one of Term One 2025. We understand that this will not be the case for all schools which is why we want to know if not Term One 2025, which Term in 2025/2026 will you be ready to have students come to learn and attend classes? When our support entity function is up and running, they will be supporting our sponsors and schools with their applications and establishment activities.
54.	Would a mixed mode of delivery be feasible with balancing land vs your roll - if we were thinking of a transitional approach with a smaller roll to begin with?	We want you to propose these things in your application - if this is how you propose to deliver it, please detail the depth in how your application would be sustainable.
55.	Do Charter Schools have access to IT support systems like: Microsoft 4 Education, Down Behind the Chair, Learning Media Resources?	This will be dependent on your arrangements made during the application and establishment stages. The Ministry considers these services as a part of the cashed up services funding.
56.	For a 6 month programme with Level 2 certification, for estimating funding student numbers - do we count the individual tauira (Students) who successfully complete our programme which will be double our number of seats at any given term?	Funding in your first year is based on an establishment roll that you will agree in your contract with the Charter School Agency. We would expect that you use prior historical data and/or expressions of interest from parents/ whanau to support your proposed roll in your application noting that in stage one, this is not locked in.
57.	Is the funding model/spreadsheet template going to be released before 9 August?	The funding factsheet has been released. Further funding information such as rates will be released in stage two. We are working on the budget estimator for stage two. For your stage one application, we are looking across your budget at a high level to understand how you will operate sustainably.
58.	Will I need to go through a “new school” application with MoE in requesting to be a new school and then, consequently receive a new MoE number?	The application process is with the Charter School Agency rather than the Ministry.
59.	In assisting a trust with their application - they are a charitable trust and plan to set up a limited liability company (in which they are the 100% shareholder) should their application be successful. They have identified the directors and have asked each proposed director to	Yes, governing members who are Directors should complete the individual Statutory Declarations.

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	complete the Declaration form and submit this with the application. Would this be acceptable?	
60.	Applications for Expression of interest are due Aug 9th. Will there be any other opportunities to submit an application? Say, if we are aiming for a later start date in 2025 or later?	This is only the first intake of applications for schools that want to open in 2025 and 2026 - in the application pack you will see there is a section where you can note the term in 2025 that you propose to open in. We expect that next year there will be future rounds that will open as well, but we cannot give further details on that yet. Regular updates will be on the Charter School Agency website.
61.	Does the statutory declaration signed by the sponsor and governance team need to be witnessed by a JP or lawyer or just a witness?	It must be an authorised witness. Only some people can witness a statutory declaration. These include: • a Justice of the Peace (JP) • a solicitor or notary public • a Registrar or Deputy Registrar of the District Court or the High Court • authorised staff in some government agencies • a member of Parliament.
62.	If the school roll is predicted to grow over a few years is the establishment funding based on the first year estimated roll or the estimated total roll after several years? Does the estimated roll after 3 years have to be the maximum school size or is there opportunity to negotiate further growth?	Your first year is based on your establishment roll for that year which you will agree in your contract with the Charter School Agency if you are successful. The following years, your funding will be per-student based on your actual roll. If you have plans or expectations that your roll will grow, we want to see this in your application noting that you are not locked into anything at this early stage.
63.	Can we open a Secondary school just for years 11 to 13?	Yes, you are able to determine the year levels you teach and your roll. The authorisation board would consider the network and Crown financial implications so we would expect your application to outline your ongoing plan for your roll.
64.	Will charter schools be able to charge stationery fees? And fees for extracurricular activities? E.g.: camps, excursions, trips etc. Confirming it is ONLY attendance fees they cannot charge? Property maintenance fees, stationary fees, excursions, meals, can be charged?	Charter schools cannot charge domestic students a fee for enrolment, attendance, the delivery of the curriculum. As well, the Bill does not cover the inclusion of charter schools in the Donations Scheme which means that schools cannot seek or receive solicited voluntary payment from parents except for overnight camps.
65.	It is going to be difficult to get witnessed signatures from all our board (six people) in the time frame. Do you have any suggestions on this?	It must be an authorised witness to progress your application. A number of people across New Zealand can witness a statutory declaration. These include:

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		a Justice of the Peace (JP) a solicitor or notary public a Registrar or Deputy Registrar of the District Court or the High Court authorised staff in some government agencies a member of Parliament. A JP is a very good option as online you can find a number of JPs available to contact across the country and/or have drop-in times at the Citizen's Advice Bureau – Justice of the Peace Citizens Advice Bureau

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Charter School Agency

Notifications for Applicants
Sponsors of Charter Schools | Kura Hourua

No. 8.0 **Date:** 08 August 2024

Your questions answered (Q&A)

Below are the questions we've received from you about the application to date. We'll be updating this section regularly as we receive and answer these.

No.	Question	Answer
1	Under subpart 6A (212H Restrictions on applications and directions) of the Education and Training Amendment Bill, a specialist school may not apply for approval to operate a charter school and The Minister may not issue a direction to the board of a specialist school to convert. Charter schools are designed to offer flexibility and autonomy, with the aim of improving student achievement. However, specialist schools are excluded from this process. The reason behind this exclusion is not explicitly stated in the Bill. Are you able to elaborate the reason why specialist schools are excluded from this process?	Specialist schools cannot convert because they are considered to have distinct settings (including governance, property and establishment). Established specialist schools are already considered within the current State schooling system as offering choice and need to their students.
2	1. Charitable Trust/GST registrations etc - If we are successful in getting a contract, it will run as a Charitable Trust. Given that this entity will only exist if we do get a contract to run a Charter School - is it expected that we go through complete registration as a Charitable Trust for stage 1 application and also get GST registered etc? 2. ORS Funding for 0.2 extra specialist teacher allocation - We are looking to serve ORS-funded children. Could you please clarify what this would look like regarding funding? If we qualified for example, 20 very-high ORS verified children, this would equate to 10 full-	1. The form of the charter school sponsor has to be a legal entity. There are pros and cons of all legal forms including Trusts. The form is a decision for the Sponsor, and we recommend that you seek advice on from an expert such as a lawyer. The process of establishing the legal form does not need to be completed by 9 August but preferably you will have decided on what legal form the sponsor prefers including a timeline for establishment. 2. ORS funding for charter schools is given to schools as a lump sum payment which is how independent

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	time staff. If they are currently at the top of the pay scale, would we be fully funded accordingly for each of the 10 ORS-funded teachers?	schools receive their ORS funding. Specific discussions about your application relative to funding can be discussed in stage two if you are successful in progressing.
3	Will a charter school opening in an area affect parent/caregiver boarding bursary eligibility at all? I.e., If a parent chooses not to enrol in a charter school in their area, will they lose boarding bursary eligibility/entitlement?	Boarding allowances are linked to the student, not the school. If a student is eligible in the state system, they will keep their eligibility regardless of whether they attend a state school or a charter school.
4	In the application it asks for Statutory Declarations from all ""Governing Members"" of the charter school. Our school is going to be operated as part of an existing company that has two directors, but the governance model is yet to be determined. Would the governing members of the school just be the Directors of the company at this point?	At this point it would just be the current Directors. As more governing members or directors come on board we can complete their statutory declarations at the time.
5	With the additional relief teaching funding, understand that the base funding is part of operational grant funding, but why are charter schools not able to access the top ups?	Charter Schools receive cashed-up funding per student that includes staffing, operational, property and learning support. Sponsors will have full flexibility to move resources as they see necessary.
6	Is there a minimum size for a secondary level school?	There is no minimum or maximum roll sizes.
7	Do qualifications have to be under the NCEA system if not using an overseas qualification? We are looking at delivering New Zealand Certificates: • Will Charter Schools have access to the same core assessment standards as State funded schools? • Will Charter Schools be able to do the co-requisites in literacy and numeracy?	They do not have to be NCEA; the only requirement is that the qualification system needs to be nationally or internationally recognised, noting that: • Charter schools will have the same NZQA approval requirements as state schools and private schools. • If a charter school wants to offer a New Zealand qualification such as NCEA, they will need New Zealand Qualifications Authority's (NZQA's) consent to assess standards. • If the charter school wants to offer a Level 3 qualification on the New Zealand Qualifications Framework, NZQA approval and accreditation is needed. • If a charter school wants to offer an internationally recognised qualification such as Cambridge or the

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		International Baccalaureate, the qualification owner will ensure that the charter school can deliver the qualification and NZQA approval is not needed.
8	Can you confirm for me please that ECE's and Puna reo are eligible to convert or establish under the Charter School legislation. From reading the draft legislation I am not clear on whether this is possible.	ECEs cannot convert or establish a new ECE - the Bill is for primary and secondary schools to establish as charter schools. However, there is nothing that precludes a sponsor of an ECE provider from sponsoring a primary or secondary school.
9	Confirming that for this application, there is no specific word count requirements for Stage One applications, and adhering to the 50MB file limit is sufficient?	This is correct, there is no word limit set for the application response.
10	For a converting school, could you confirm at what point the current board of trustees would become ""obsolete" (assuming an application is successful) and a new governing structure takes over?	According to the proposed legislation, the Board of Trustees will be dissolved on the conversion date. The conversion date means the date on which the State school became a charter school. This date will be agreed in the contract with the Charter School Agency to support the proposed opening date of the school.

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Document 8

Charter School Agency

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.

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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.

About Charter Schools | Kura Hourua

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.
- Read the Education and Training Amendment Bill - New Zealand Parliament (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:	Helen Saville
Role:	Applications process lead

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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
Briefing date and time:	17 September 2024 | 3:30pm
Microsoft Teams Link	**Join the briefing with this link** • Meeting ID: 411 811 512 604 • Passcode: sMbpHQ

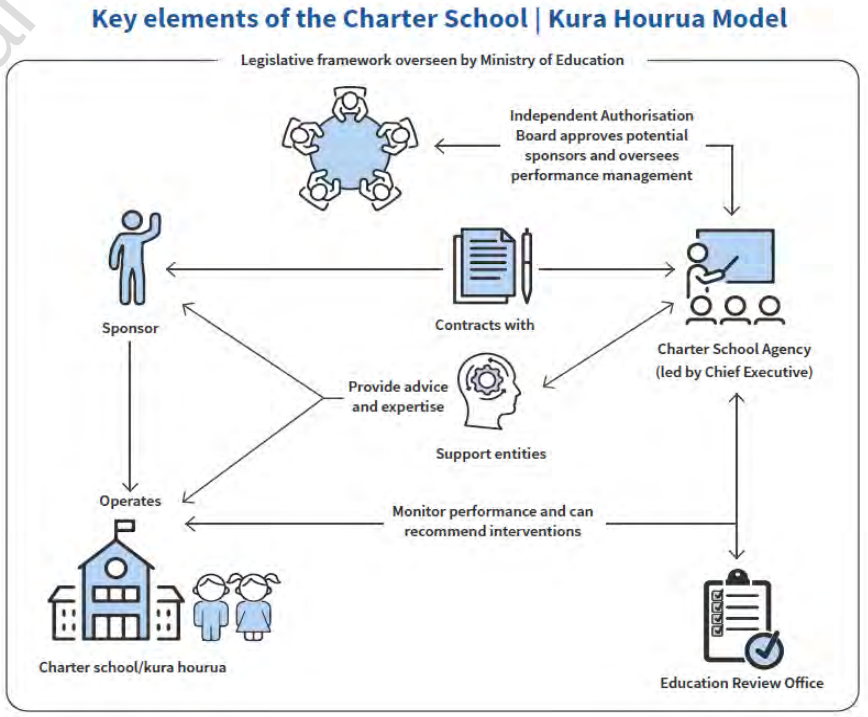
- You do not need to register with us to attend this briefing.
- If you miss it, we will be providing a transcript and the slide pack from the briefing to all stage two applicants.

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



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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 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

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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.

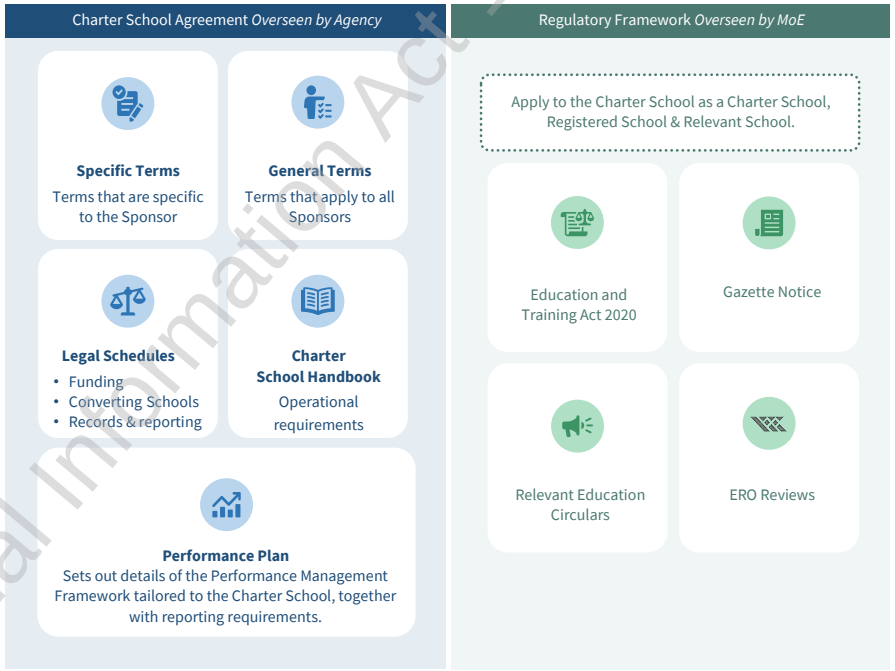
While getting to stage two is a great achievement, considering the level of interest, please remember that this does not guarantee approval of your application. Regardless of the outcome, we will be providing thorough feedback and communication to you throughout this process.

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)

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- 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 - https://www.govt.nz/browse/law-crime-and-justice/making-a-statutory-declaration/
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 **must** photograph the whole document on the page and not just a snip of the signature box.

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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.

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What you'll get in funding

This section will provide guidance on the funding model. It introduces the different types of funding and how they work.

It also introduces the Funding Calculator which has been released with this tender pack.

This document **What you'll get in funding** is part 2 of 5 application documents. Please make sure that you read all documentation provided including the additional appendixes.

Funding

The below table outlines the difference tranches of funding, based on a per student model, available for Charter Schools.

Type	Description
Establishment funding	New charter schools will receive funding to establish the school including: • a per-student amount similar to the state school rate for administration, library/resource centres, and teaching and learning material costs. • funding to employ principals, senior teachers, and other teachers in the period before opening.
Staff-based funding	Funding based on a per-student rate and paid as cash calculated based on school type and number of students. Additional funding is provided for Māori or Pacific immersion education for specific students.
Services-based funding	Funding for specific nationally provided services that for state schools is provided by the Ministry of Education, including digital, payroll services and nationally provided professional learning and development services. This is calculated based on per-student value based on state school service provisions. Note: *Not all services are included in this rate. Charter Schools can access some of these other services separately.*
Operational grant funding	Same operational grant components as state schools with components that are not "per-student" replaced with broadly equivalent per-student funding.
Property funding	Per-student rates for capital maintenance and the renewal of furniture and equipment based on the property arrangement (Ministry or Non-Ministry property) and the relevant state school funding components. For Charter Schools in Ministry-owned property, there will be a transition over five years where funding and responsibility is split between the Ministry and the sponsor.

Learning support will be provided based on the needs of the individual student and is excluded from the funding above.

Calculating your funding entitlement

A funding calculator has been made available through this stage two application process to enable sponsors to work through their own assumptions and provide guiding estimates in respect to funding.

Final funding entitlements will be completed and documented in the contracting phase concluding this stage two application process for successful sponsors.

Paying your funding entitlement

It is anticipated funding will be paid to sponsors as follows:

The resulting contracts between the sponsor and Agency will include a funding schedule outlining specific requirements as well as allowing for a process to 'wash up' unders and overs on funding entitlements and recovery.

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Property considerations

Charter Schools will have one of the following property arrangements:

New schools	Converting schools
New schools will occupy non-Ministry owned property such as: • property owned and managed by a sponsor), or • commercial leasing arrangements. New schools must meet all statutory and regulatory compliance under their contract with the Charter School Agency.	Converting schools will occupy Ministry owned property. Converting schools must meet all statutory and regulatory compliance under their contract with the Charter School Agency. They are also subject to Ministry of Education property management requirements such as: • Regular operational maintenance activities and targets • Reactive maintenance activities and processes

Further detail about the property maintenance activities and targets for Ministry property can be provided on request.

Property funding

Property funding is different depending on who owns the property:

Charter Schools in non-Ministry-owned property

Charter Schools in non-Ministry owned property will be funded on a flat per-student rate as an operating expense.

- The funding rate for Charter Schools in sponsor owned property will be based on the approach for capital maintenance funding for State integrated schools (Policy One). Find out more about Policy One on the Ministry of Education website.
- The funding rate for furniture and equipment for Charter Schools in non-Ministry owned property will be based on a per student funding rate of the renewal funding provided to State schools.

Charter Schools in Ministry-owned property

Charter Schools in Ministry-owned property will pay a nominal lease rate and receive property funding for capital maintenance funding which reflects the current capital maintenance funding for State schools.

There will be a transitional period for providing this funding to sponsors of Charter Schools on Ministry-owned property.

- In the first-year property funding for Charter Schools in Ministry-owned property will be comparable to the capital funding budget allocated to schools and increase over the following four years to be broadly equivalent to the total expected value of maintenance and renewal funding of similar State schools.
- Throughout this period, the sponsor will take increasing responsibility to manage and maintain the buildings that they occupy, with further recourse to the Crown decreasing to nil.

At least 70 percent of the capital maintenance funding for Ministry-owned property will be provided to sponsors in the form of capital funding to spend on Ministry-owned buildings, with the remaining converted to an operating expense and provided to Sponsors to incentivise them to be more efficient and to support the overall intent of the Charter School funding model.

- However, sponsors will still have to meet terms and conditions set out in a contract between the Ministry of Education and Sponsors for the management and use of Crown assets.
- They will also receive funding proportionate to the renewal component of furniture and equipment funding based on property funding for State schools.

Calculate your property funding using the funding calculator.

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The measures and targets

This section will explain the performance expected of your school should your application be successful. It sets out the different outcomes we want to see, and how we will measure your success in achieving those outcomes.

A significant part of our selection criteria is based off this section, so please read it carefully and ask any questions if you have them.

This document **The measures and targets** is part 3 of 5 application documents. Please make sure that you read all documentation provided including the additional appendixes.

Performance management framework

Charter Schools are subject to increased oversight and accountability through the performance management framework. It will enable interventions when required while also supporting high-performing Charter Schools to grow and share good practice.

The framework will address challenges encountered in the prior model such as reducing duplication across legislation and contracts, providing clarity on the roles of the Ministry and ERO, allowing the collection of complete and sufficient data from schools; and ensuring interventions are well understood by sponsors.

Measures and targets

The framework sets out clearly defined performance outcomes, measures, and targets, as well as the tools used to track these. It will be used to hold sponsors to account and will provide Government and the community with assurance that Charter Schools are delivering quality education. The specific performance outcomes, measures and targets will be included in the sponsor's contract with the Charter School Agency**.**

Monitoring

The Charter School Agency will take primary responsibility for day-to-day monitoring of Charter Schools but will work collaboratively with the Education Review Office (ERO) to deliver an effective Monitoring Framework.

The framework will hold sponsors accountable to contracted performance outcomes. The Charter School Agency will report as required to the Authorisation Board.

The Charter School Agency's monitoring activities include:

- Review of Charter Schools annual self-audit in June of each year (required under legislation) including a set of independently audited financial accounts.
- Additional reporting milestones included in contracts, including end-of-year reporting in December against some outcome areas.
- Contracts will specify what performance information is to be provided, 4through the use of specific tools or submission of data. The performance measures and targets will be standardised across schools or a group of schools.

ERO's role is to further strengthen accountability and public transparency, and they will:

- Conduct pre-establishment checks on new charter schools and complete verification reports within the first year of establishment.
- Conduct cyclical monitoring to validate and verify the information provided by charter schools against their contracts, with a primary objective of ensuring the physical and emotional safety of children and young people is maintained. These reports will be published to ensure public transparency.

Intervention framework

The intervention framework lays out specific actions that can be used where a charter school is not meeting its contractual or legislative obligations, including performance outcomes and targets, or not providing information needed to assess performance.

The intervention framework will operate proportionally, with the objective of responding to poor performance using the most appropriate level of intervention. The Authorisation Board will consider progress over time when applying an intervention.

Interventions to be set in legislation and used by the Authorisation Board	
1	Require a sponsor to provide specific information or carry out a specific action
2	Require the Education Review Office to conduct a review of the school
3	Replacement of the sponsor
4	Termination of the contract

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Charter School | Kura Hourua Performance measures

Outcome	Measure	Targets*	Reporting Tool/ Method	Frequency
Attendance	Attendance at school (Mean attendance)	Expected to be a standardised target percentage of attendance.	Electronic Attendance Register, e.g., ENROL with an SMS	Daily and termly; annually as part of self-audit in June

Outcome	Measure	Targets*	Reporting Tool/ Method	Frequency
Student Achievement	**Primary Years 3 to 10** • Reading or Pānui • Writing or Tuhituhi • Mathematics or Pāngarau	Expected to be a target percentage of all students at or above expected curriculum level for each year level with progress to be measured as a whole of school level.	Assessment tools such as: • e-asTTle (MoE) • Progressive Achievement Tests (PATs - NZCER) • Te Waharoa Ararau (MoE)	Biannually – as part of self-audit in June and follow-up report in December
	Secondary Years 11 and above • Qualification attainment	Expected to be a standardised target across all schools with performance thresholds applied based on Equity Index Bands.	NCEA Level 2 attainment/equivalent in an approved qualification	Annually as part of self-audit in June

Outcome	Measure	Targets*	Reporting Tool/ Method	Frequency
Financial Performance	**Financial Health –Key Indicators include:** • Operating surplus • Working capital ratio • Debt/equity ratio • Operating cash • Enrolment variance	Expected individual targets against each of the Key Indicators	Annual self-audit and follow-up report	Biannually – as part of self-audit in June and follow-up report in December

***Final decisions on targets are still being made and will be provided as soon as they are confirmed.**

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Outcome	Measure	Targets*	Reporting Tool/ Method	Frequency
Financial Performance	**Financial Probity** • Discharge of all contractual obligations before using any profit • Notification when any source of anticipated funding (on which the ongoing viability of the sponsor or school(s) is dependent) will not be available. • Notification of any failure to pay debt from borrowed money; or of any expectation they will fail to pay this debt in future. • Related party disclosure • Sensitive expenditure policies in place • Expected use of funds and financial plans	Financial probity will not require performance targets. A sponsor's failure to meet standards carries an immediate risk to students and/or school operations.	Annual self-audit and follow-up report	Biannually – as part of self-audit in June and follow-up report in December

Outcome	Measure	Targets*	Reporting Tool/ Method	Frequency
Standard Minimum Compliance (SMC)	• Minimum of 75% certificated teachers and up to 25% Limited Authority to Teach holders (LATs) appointed to teaching positions in Charter Schools. • Student enrolment requirements • School day, hours, and term date requirements • Reporting requirements • Record keeping and data management • Insurance • Transport provision requirements (if applicable) • Property (if applicable)	SMC measures will not require performance targets. A sponsor's failure to meet standards carries an immediate risk to students and/or school operations.	Annual self-audit, including: • Sponsor Assurance Statement • self-audit check	Annually as part of self-audit in June

***Final decisions on targets are still being made and will be provided as soon as they are confirmed.**

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Our timeline and our approach to assessing your application

In this section you can see the detailed timeline for the rest of this application process and gain insight into the selection criteria, the questions we'll be asking and our approach to assessing them.

We'll be providing a briefing for the stage two application process on 17 September at 3:30pm. If you're interested in attending this then please refer to the application overview for the link to attend.

This document **Our timeline and our approach to assessing your application** is part 4 of 5 application documents. Please make sure that you read all documentation provided including the additional appendixes.

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Timeframes

The stage two timeframes are as follows:

Task	Date
Applications for stage two open	11 September 2024
Applicant briefing	3:30pm 17 September 2024
Deadline for applicant questions	Midday; 12:00pm, 4 October 2024
Stage two applications close	Midday; 12:00pm, 11 October 2024
Application compliance/preparation	11 October 2024
Authorisation Board makes decisions	29 October 2024
Successful applicants advised	Week of 4 November 2024
Unsuccessful applicants advised	Week of 4 November 2024
Contract negotiations commence	Week of 4 November 2024
Contract signed	November - December 2024
Unsuccessful applicants receive debrief	November - December 2024
Contract start date	November/December 2024
Contract end date (initial term)	February 2035

Applying the ratings

For stage two, two assessment ratings are available to the assessment panel which are:

Rating	Description
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.

Ratings will not be applied on a question-by-question basis and will only be applied at the criteria level below.

Criteria

The detailed criteria that will enable the Authorisation Board to make their final decisions on applications are split across three sections:

- Sponsor capability
- Contribution to the wider school network
- Operational fitness

The Authorisation Board will consider the ratings of the assessment panel and exercise their judgement to factor the ratings into their decisions to agree decisions on applications.

In using the ratings and their judgement against the criteria above, they will consider how the applicant's response to the criteria demonstrates that the applicant can meet the mandatory conditions in the Bill.

When selecting sponsors, the Authorisation Board will take into account a number of factors, including:

- the focus of the proposed school
- the capability of the sponsor
- financial implications for the Crown
- if it meets the 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

Converting schools also have additional criteria to be considered such as the performance of the school and the level of support for the sponsor and the conversion from the school community, school staff, and students.

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Part One. Sponsor capability	Possible ratings	"Not viable" or "Viable"

The requirements for this section are to demonstrate the leadership of the sponsor and how the proposed governance structure will support the operations and outcomes of the Charter School.

Financial acuity

1. Demonstrate your financial acumen through a profit/loss (P&L) balance sheet for your first three years of operation.
2. Demonstrate how you will use the P&L to influence the governance structure to make decisions for your school and manage financial and business performance?

Leadership and community

3. Outline a clear approach to governance that details how your leadership/value proposition will attract families/students to enrolment. It is important to include specific detail here, as the students will be the main source of your funding.
4. How will the governance and organisation structure positively impact student achievement and attendance. Consider the key responsibilities of your teaching workforce in relation to the students and how this will be operationalised day to day.
5. As a leader or potential leader in your community, demonstrate with a stakeholder breakdown how the community consultation you have undertaken has informed your decisions about your Charter School, identifying where there is risk and where there is support for your school.

Part Two. Contribution to the wider school network	Possible ratings	"Not viable" or "Viable"

The requirements for this section are to demonstrate what impact the school will have with students and the wider school network and how it will prepare students for life in wider society.

6. As well as uplifting academic achievement and attendance, how will the school positively impact it's students and contribute to the wider school network / education sector?
7. How will the school help prepare students for life in wider society, outside of the specific focus or setting of your Charter School?
8. Why would parents/families choose your Charter School over other schooling options that are already available to them?

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Part Three. Operational fitness	Possible ratings	"Not viable" or "Viable"

The requirements for this section are to demonstrate your readiness to open in 2025 and how your school will deliver outcomes against the Performance Management Framework.

Readiness to open

9. Demonstrate your readiness to open for Term One 2025 (or the term that you have specified for opening) by showing across the following establishment areas what you will have in place for students to be welcomed in Term One 2025:
    a. Staffing
    b. Finance
    c. Curriculum
    d. Roll
    e. Health and Safety
10. In stage one you listed the physical assets required (e.g., buildings, classrooms, sports facilities) and outlined the plan for acquiring, developing, or leasing these assets. Now, demonstrate how you will:
    a. operationalise the property and infrastructure components of your application, ready to welcome students for Term One 2025.
    b. maintain your property and infrastructure within the funding allocation you will receive.

Performance and longevity

11. Noting the Performance Management Framework, outline your performance management strategy including:
    a. how the strategy will enable and support monitoring against each performance measure below and:
    b. how will you manage the early identification of issues and risks and what preventative measures will you take to address these?
12. Tell us in a practical way the reality of a teacher and a student on the ground at the school in a day-to-day setting and how this will endure over the life of the contract.

Due diligence, (the type being at the discretion of the Application Process Lead) may be undertaken before, during or after assessment on one or more applications to determine whether entering into a contract with a sponsor may expose the Charter School Agency to undue risk.

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Charter School Agency

The Response Form

What you'll need to provide

- ☑ A written response to our assessment criteria using sections one-three of **The Response Form** and outlined in application document #4: Our timeline and approach to assessing your application.
- ☑ There are no page limits, but you must answer all questions.
- ☑ Sign the application declaration at the end of this document.
- ☑ If you have new governing members, complete statutory declarations for all new governing members.
- ☑ If you have any comments with regard to the draft contract, use section four of **The Response Form**.
- ☑ If anything has changed since submitting your stage one application, use section five of **The Response Form**.

This document **The Response Form** is part 5 of 5 application documents. Please make sure that you read all documentation provided including the additional appendixes.

Submitting your application

1. Applications must be submitted electronically through the GETS e-Tender box function no later than **midday; 12:00pm, 11 October 2024**.
2. Please plan accordingly to allow sufficient time for the upload to complete before the application deadline. If you do encounter technical issues when you are submitting, please contact the applications team immediately at applications@charterschools.govt.nz.
3. Applications not submitted by the deadline time and date may be excluded from assessment at the discretion of the Charter School Agency.
4. Please clearly name your files as follows:
    a. [Applicant/sponsor name – Response form for Charter Schools - Kura Hourua]
    b. [Applicant/sponsor name – Statutory declaration for Charter Schools - Kura Hourua]

Application process terms and conditions

This process is undertaken in accordance with the Charter School Agency application terms and conditions. By applying, the applicant agrees to the terms and conditions appended to this application.

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Part One. Sponsor Capability

The requirements for this section are to demonstrate the leadership of the sponsor and how the proposed governance structure will support the operations and outcomes of the Charter School.

Questions 1-2: Financial acuity

1. Demonstrate your financial acumen through a profit/loss (P&L) balance sheet for your first three years of operation.
2. Demonstrate how you will use the P&L to influence the governance structure to make decisions for your school and manage financial and business performance.

[Insert your answer to question 1]

[Insert your answer to question 2]

Questions 3-5: Leadership and community

3. Outline a clear approach to governance that details how your leadership/value proposition will attract families/students to enrolment. It is important to include specific detail here, as the students will be the main source of your funding.
4. How will the governance and organisation structure positively impact student achievement and attendance. Consider the key responsibilities of your teaching workforce in relation to the students and how this will be operationalised day to day.
5. As a leader or potential leader in your community, demonstrate with a stakeholder breakdown how the community consultation, that you have undertaken, has informed your decisions about your Charter School, identifying where there is risk and where there is support for your school.

[Insert your answer to question 3]

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[Insert your answer to question 4]
[Insert your answer to question 5]

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Part Two. Contribution to the wider school network

The requirements for this section are to demonstrate what impact the school will have with students and the wider school network and how it will prepare students for life in wider society.

Questions 6-8

6. As well as uplifting academic achievement and attendance, how will the school positively impact it's students and contribute to the wider school network / education sector?
7. How will the school help prepare students for life in wider society, outside of the specific focus or setting of your Charter School?
8. Why would parents/families choose your Charter School over other schooling options that are already available to them?

[Insert your answer to question 6]

[Insert your answer to question 7]

[Insert your answer to question 8]

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Part Three. Operational fitness

The requirements for this section are to demonstrate your readiness to open in 2025 and how your school will deliver outcomes against the Performance Management Framework.

Questions 9-10: Readiness to open

9. Demonstrate your readiness to open for Term One 2025 (or the term that you have specified for opening) by showing across the following establishment areas, what you will have in place for students to be welcomed for learning in Term One 2025:
    a. Staffing
    b. Finance
    c. Curriculum
    d. Roll
    e. Health and Safety
10. In stage one you listed the physical assets required (e.g., buildings, classrooms, sports facilities) and outlined the plan for acquiring, developing, or leasing these assets. Now, demonstrate how you will:
    a. operationalise the property and infrastructure components of your application, ready to welcome students for Term One 2025.
    b. maintain your property and infrastructure within the funding allocation you will receive.

[Insert your answer to questions 9a-e]

Staffing	Finance	Curriculum	Roll	Health and Safety

[Insert your answer to question 10a]

[Insert your answer to question 10b]

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Questions 11-12: Performance and longevity

11. Noting the Performance Management Framework, outline your performance management strategy including:
    a. how the strategy will enable and support monitoring against each performance measure in the framework and:
    b. how will you manage the early identification of issues and risks and what preventative measures will you take to address these?
12. Tell us in a practical way the reality of a teacher and a student on the ground at the school in a day-to-day setting and how this will endure over the life of the contract.

[Insert your answer to question 11a]

[Insert your answer to question 11b]

[Insert your answer to question 12]

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Part Four. Comments on the draft agreement 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 (see the Application Declaration below to confirm this).
Applicants wishing to propose any amendment to the Specific Terms of the Agreement for consideration must do so as part of this application.
[Insert proposed amendments to the Specific Terms]

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Part Five. Changes to your stage one submission Let us know if anything has changed since you submitted your stage one application.
Document if your circumstances or any information regarding your submission has changed since submitting your stage one application. Please reference the section and, if applicable, the question number where your information has changed since stage one.
[Insert changes since your stage one submission]

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Part Six. Application Declaration		
Topic	**Declaration**	**Applicants' 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:	The Applicant/s authorises the Charter School Agency and the Ministry of Education to: • collect any information about the Sponsor, except commercially sensitive pricing information, from any relevant third party, including a referee. • use such information in the assessment of this Application. The Applicant /s agrees that all such information will be confidential to the Charter School Agency and the Ministry of Education.	[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]
Draft Agreement:	The Applicant/s accepts the General Terms and Legal Schedules of the Agreement and confirms that they have prepared their application on the basis that no amendments to the General Terms and Legal Schedules will be considered.	[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 Application Point of Contact. When you sign the declaration, please consider any perceived, potential or actual conflicts of interest. For example, if you have had any communication or input from the Establishment Board with regard to your application.	[agree / disagree]
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'].		

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DECLARATION

I/we declare that in submitting the Application and this declaration:

- the information provided is true, accurate and complete and not misleading in any material respect
- the Application does not contain intellectual property that will breach a third party's rights
- 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.
- 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.

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.

Signature:	[insert]
Full name:	[insert]
Title / position:	[insert]
Name of organisation:	[insert]
Date:	[insert]

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Charter School Agency application terms and conditions

Section	Term/condition
Part One. Preparing and submitting an application	
1. Preparing an application	a. The applicant must: i. Read the complete application and any additional information provided and referred to by the Charter School Agency. ii. Respond using the application response form provided and include all information that the Charter School Agency requests. iii. Make sure the details in the application are correct and not misleading in any material aspect. b. By submitting an application, the applicant accepts the application terms and conditions outlined in this document. c. The applicant must make sure they understand the application process. If the applicant has any questions or needs clarification, they: i. Must submit questions before the deadline for questions outlined in the application document. ii. Must clearly indicate any commercially sensitive information in their questions. iii. May withdraw their questions at any time. d. When the Charter School Agency receives questions before the deadline for questions, they: i. Will respond on or before the deadline for answers. ii. May provide details of both the questions and the answers to other applicants. In these circumstances the Charter School Agency will summarise the questions and will not disclose the applicant's identity. iii. Will post both the questions and answers on GETS. iv. Will not publish the applicant's commercially sensitive information. If the Charter School Agency considers the information to be significant for all applicants, the Charter School Agency may modify the question and publish both this and the answer. In that case the Charter School Agency will first give the applicant the opportunity to withdraw the question or remove any of their own commercially sensitive information. e. Except as otherwise stated in the application, the applicant must meet their own costs associated with the preparation, presentation, and negotiation of the application.

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2. Submitting an application	a. The applicant must ensure the Charter School Agency receives the application through the correct channel and in the correct format on or before the deadline for applications. b. After the deadline for applications, the Charter School Agency will acknowledge receipt of the application. c. The Charter School Agency may rely on the application and all information provided by the applicant during the application process (e.g., Correspondence and negotiations).
3. Assessing applications	a. The Charter School Agency's assessment panel will assess the application. The make-up and roles of the panel members are at the discretion of the Charter School Agency. Different panel members may assess different aspects of the application and it may include independent and/or external advisors as panel members to assess some or all aspects of the application. b. The Charter School Agency may ask the applicant for more information or clarification on the application at any time during the application process but need not ask all applicants for the same clarification. c. The applicant agrees to provide the information or clarification as soon as possible, in the format requested by the Charter School Agency. d. If the applicant does not provide adequate information or clarification within a reasonable time (as determined by the Charter School Agency), the Charter School Agency may remove the application from its assessment process. e. The Charter School Agency will assess the application according to the assessment approach outlined in the application document but may adjust its assessment after considering additional information or clarification, as described in 3.b. above. f. The Charter School Agency must treat each assessed applicant fairly. g. The Charter School Agency may exclude the applicant from the application process on the following grounds: i. Breach of the application terms and conditions and the Charter School Agency considers the impact of the breach is more than trivial (this applies whether the provision in question is itself legally binding on the recipient). ii. Inclusion of a material error, omission or inaccuracy in the application. iii. Does not meet any aspect of the application process pre-condition(s) or other aspect of the assessment. iv. Serious performance issue in a previous, or current, contract delivered by the applicant v. A material conflict of interest arises. vi. The Charter School Agency considers the integrity of the applicant is in doubt due to the applicant's professional misconduct or an act or omission. vii. The Charter School Agency becomes aware of any other matter that materially diminishes the Charter School Agency's trust in the applicant.

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4. Decisions to progress applications	a. The Charter School Agency will progress applicants who have met the assessment approach outlined in the application document through to the next application stage. b. The Charter School Agency may adjust who progresses after considering additional information or clarification, as described in as described in 3.b. and 3.g. above. c. If any applicant application is progressed, this does not mean the Charter School Agency has accepted any applicant and/or application or made any form of offer or commitment. There is no obligation on the Charter School Agency to progress an application to further or enter into negotiations with, or award any contract to, any applicant.
5. Applicant debrief	a. At the end of the application process, the Charter School Agency will offer to debrief the applicant. This debrief may be by letter, email, phone or a meeting. b. The Charter School Agency will provide the debrief within 30 business days from either the date of the applicant's acceptance of a debrief, or the date the contract(s) is/are signed, whichever is later. c. The debrief will: i. Explain why the application was or was not progressed. ii. Explain how the application performed against the pre-conditions and the assessment criteria. iii. Indicate the application's relative strengths and weaknesses. iv. Explain, in general terms, the relative advantages of successful applications. v. Seek to address any concerns or questions from the applicant. vi. Seek feedback from the applicant on the application and application process. vii. Provide guidance to the applicant about future applications and where prudent direct them to available support for future applications
6. Notification of Outcome	a. After final decisions have been approved, the Charter School Agency: i. Will let all unsuccessful applicants know in writing that they have not been approved and offer a debrief to the applicant.
7. Issues and Complaints	a. The applicant may, in good faith, raise with the Charter School Agency any issue or complaint about the application or application process at any time. When this occurs: i. The Charter School Agency will consider and respond promptly and impartially to the applicant's issue or complaint. ii. Both the applicant and the Charter School Agency must do their best to resolve the issue or complaint.

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	iii. The Charter School Agency must not allow the issue or complaint to prejudice the applicant's participation in the application process, or limit or affect the applicant's future applicant opportunities.
Part Two. Standard application conditions	
8. Application point of contact and communication	a. The applicant must not approach any employee or other representative of the Charter School Agency, the Ministry of Education (as host of the Charter School Agency) or the independent Charter School Authorisation Board directly or indirectly, for information on any aspect of the application. b. Only the point of contact, or a person authorised by the Charter School Agency, may communicate with the applicant on any aspect of the application or application process. The Charter School Agency will not be bound by any statement made by any other person. c. The Charter School Agency may change its point of contact at any time. The Charter School Agency will notify the applicant of any change by posting a notification on GETS and the Charter Schools website. d. If the applicant has an existing contract with the Charter School Agency, or Ministry of Education, the applicant must not use its business-as-usual communications to contact the Charter School Agency regarding the application.
9. Ethics	a. The applicant must not attempt to influence, reward or benefit any representative of the Charter School Agency or the Ministry of Education, nor offer any form of personal inducement, in relation to the application or the application process. b. To maintain a fair and ethical application process, the Charter School Agency may require additional declarations or other evidence from the applicant, or any other person, at any time.
10. Anti-collusion	a. By submitting the application, the applicant warrants that: i. The application has not been prepared in collusion with another party. ii. It will not engage in deceptive or improper conduct during the application process. b. The Charter School Agency reserves the right to report suspected collusion or deceptive or improper behaviour to the appropriate authority, and to give that authority all relevant information, including the application.
11. Confidential information	a. Without limiting any other confidentiality agreement between them, the Charter School Agency and the applicant will both take reasonable steps to protect the other party's confidential information. b. Except as permitted by the other provisions of this section 11, neither party will disclose the other party's confidential information to a third party without that other party's prior written consent. c. Each party may each disclose the other party's confidential information to anyone who is directly involved in the application process on that party's behalf, but only for the purpose of participating in the application. This could include (but is not limited to) officers, employees, consultants, contractors, professional advisors, assessment panel members, partners, principals or directors. Where this

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	occurs, the disclosing party must take reasonable steps to ensure the third party does not disclose the information to anyone else and does not use the information for any purpose other than participating in the application process. d. The applicant acknowledges that the Charter School Agency's confidentiality obligations are subject to those outlined in the Official Information Act 1982 (OIA), the Privacy Act 2020, Parliamentary and Constitutional Convention, and any other obligations imposed by law. Where the Charter School Agency receives an OIA request that relates to an applicant's information, the Charter School Agency will consider if it is confidential or commercially sensitive in nature and take the appropriate steps. e. The applicant may disclose the Charter School Agency's confidential information to the extent strictly necessary to comply with law or the rules of any stock exchange on which the securities of the applicant or any related entity are currently listed. Unless prohibited by law, the applicant must consult with the Charter School Agency before making such a disclosure. f. The Charter School Agency will not be in breach of its obligations if it discloses confidential information to the appropriate authority because of suspected collusive, deceptive or improper behaviour.
12. Ownership of documents	a. The application and its contents remain the property of the Charter School Agency. All intellectual property rights in the application remain the property of the Charter School Agency or its licensors. b. The Charter School Agency may request the immediate return or destruction of any application documents and any copies, in which case the applicant must comply in a timely manner. c. All documents forming part of the application will, once they are sent to the Charter School Agency, become the property of the Charter School Agency. The application will remain on file with the Charter School Agency to keep appropriate records. d. Intellectual property rights in the application remain the property of the applicant or its licensors. e. The applicant grants to the Charter School Agency a licence to retain, use, copy and disclose information contained in the application for any purpose related to the application process, including keeping appropriate records.
13. Charter School Agency's additional rights	a. The Charter School Agency may amend, suspend, cancel or re-issue the application, or any part of it, so long as it notifies the applicant. b. The Charter School Agency may change material aspects of the application, such as the timeline, requirements or assessment approach, provided it gives the applicant time to respond to update its application in relation to the changes. c. The Charter School Agency may accept a late application if it is the Charter School Agency's fault it is late, or if the Charter School Agency considers there is no material prejudice to other applicants in accepting a late application. d. The Charter School Agency may answer a question submitted after the deadline for questions and notify all applicants about the submission of the question and the answer. e. The Charter School Agency may waive requirements or irregularities around the application process if the Charter School Agency considers it appropriate or reasonable to do so.

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14. New Zealand law	a. The laws of New Zealand govern the application process. Each applicant agrees New Zealand courts have non-exclusive jurisdiction to rule in any dispute concerning the application or the application process. The applicant agrees that it cannot bring any claim in relation to the application process except in a New Zealand court.
15. Disclaimer	a. Nothing contained or implied in the application, or application process, or any other communication by the Charter School Agency to the applicant is to be construed as legal, financial, or other advice. b. The Charter School Agency will endeavour to provide accurate information in any communication, but the applicant accepts this information is not independently verified and may not be up to date. c. The Charter School Agency will not be liable in contract, tort, equity, or in any other way for any direct or indirect damage, loss or cost incurred by the applicant or any other person in respect of the application process, whether as a result of the Charter School Agency exercising its rights under section 13, the Charter School Agency's negligence or breach of these application terms, the Charter School Agency failing to select the applicant as an approved Applicant, or any other cause.
16. Precedence	a. Any conflict or inconsistency in the application process shall be resolved by giving precedence in the following descending order: i. The application documents 1-5 in their numerical order (1 having the most precedence). ii. These application terms and conditions. iii. All other sections of the application document. iv. Any additional information or document provided by the Charter School Agency to applicants through the Charter School Agency's point of contact or GETS. v. If there is any conflict or inconsistency between information or documents having the same level of precedence the more recent information or document will prevail.

For more information you can visit the website www.charterschools.govt.nz.

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Glossary

Term	Meaning
The Act	means the Education and Training Act 2020.
The Agreement, Charter School Agreement	means a contract for the establishment and operation of a Charter School entered into under section 212L of the Act, and in relation to a sponsor, means the Charter School Agreement to which the sponsor is a party.
The Bill	means the Education and Training Amendment Bill submitted to the Cabinet Legislation Committee relating to Charter Schools | Kura Hourua resulting in legislation (The Act) once passed.
Applicant	means a business or organisation who has submitted an application to be considered as a sponsor of a Charter School.
Application, sponsor application	means the information provided in response to the Charter School Agency application process by an applicant who wants to be considered as a sponsor of a Charter School.
Application process	means the process run by the Charter School Agency to receive and have considered applications relating to Charter Schools.
Approval	means Authorisation Board decision to approve stage two applications to proceed to contract negotiations to be led by the Charter School Agency.

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Assessment	means the reviews and evaluation undertaken on applications.
Authorisation Board	means the board which is to be established under section 212A of the Act, via the Bill to make decisions on the application process, progressing sponsors to contract negotiations where sponsors may enter into a contract to operate a Charter School (and any other capacity as described in the Bill and/or The Act).
Business or organisation	means by definition in the Act via the Bill, a body corporate, corporation sole, limited partnership, institution, or related entity applying to be considered as a sponsor.
Charter School | Kura Hourua or Charter School	means a school operated by a sponsor, who has been approved by the Authorisation Board, in contract with the Crown under the Education and Training Act 2020 (once the Education and Training Amendment Bill is passed).
Charter School Agency	means the departmental agency established on 1 July 2024 under the Public Service Act 2020, to implement and operate the new Charter School model, including negotiating and managing contracts, delivering funding, and supporting the Authorisation Board.
Converting or converting state school	means a state school that proposes to convert (which includes state-integrated schools, Kura Kaupapa Māori, designated character schools, but excludes specialist schools) to a Charter School.
Due diligence	means checks undertaken on information provided and as required as described in the application.
Establishment roll	means a realistic and evidence-based forecast of the Charter School's roll in its fifth term of operation (i.e. if a school opened in Term One 2025, the establishment roll would be based on the projected roll for Term One 2026).
Focus/setting	means the individual characteristics of the school.
Governing member	means any director or member occupying a position equivalent to that of a director, a trustee and/or partner.
Ministerial Advisory Group / Establishment Board	means the independent group established to provide advice to the Minister relating to Charter Schools.

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Model	means the described approach and structure to successful contribution and/or operation to the proposed Charter School.
Network or school network	means the 2,500 (on or near at any time) state, state-integrated and any Charter School established schools across New Zealand (including the Chatham Islands) funded by the Government to offer free education and enrolment to students.
Physical or cultural asset or asset	means any property of value relating but not limited to infrastructure, technology, culture.
Potential or proposed sponsor	means the business or organisation interested in or having submitted an application.
Proposed school	means the existing state school proposing to convert or new school proposing to establish.
School/schools	means state or private schools (other than a specialist school).
School community or community	means the definition given in section 10 (1) of The Act.
Sponsor	means the governing body of a Charter School approved by the Authorisation Board to operate a Charter School.
Stage one	means the first step of two stages of this application process determining invitations to stage two.
Stage two	means the second of two stages of this application process of which is by invitation following stage one.
State school	means the Government funded Crown entities that offer free education as set out in the Act.
The Minister	means the Associate Minister of Education, Hon. David Seymour.

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Charter School Agency

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**	*If yes, please provide details of the serious criminal activity.*
Bankruptcy and director/promoter prohibitions	Has the governing member been • 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, o a company under the Companies Act 1993 or o any other body corporate?	**Yes / No**	*If yes, can you provide details such as bankruptcy records or declarations regarding prohibitions?*
Interventions in other charter schools	Has an intervention been applied in relation to another charter school of which the person is or	**Yes / No**	*If yes, what were the circumstances and outcomes of such interventions?*

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	was a governing member of the sponsor?		
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**	*If yes, can you provide details of any such breaches and measures taken to address them?*
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**	*If yes, please detail what these factors or concerns are and how you would address them.*
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/title	name and title (i.e. solicitor, JP) of witness		
Official witness signature	signature of witness who is a person authorised to take a statutory declaration		
Date:	date		

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Charter School Funding Entitlements Calculator (2025)

Purpose

This calculator has been developed for the Charter School Agency to estimate Charter School funding entitlements for the 2025 calendar year. **It is not intended for use in determining actual payments** or providing any form of **guarantee of funding**.

Notes

Some cells in the calculator have been prepopulated with specific values due to the restrictions of the calculator. These must be replaced with the information relevant to your proposed school. The prepopulated values are not specific to your project and should be updated with your own data.

Some decisions regarding the roll basis of funding are still pending. For further details on how roll returns affect state school funding, visit the Ministry of Education website.
How operational funding is calculated – resourcing rolls – Education in New Zealand
These figures are provisional and should only be considered indicative. They do not imply any guarantee of funding. Refer to the Charter School Agency website for the latest information.
Information for sponsors and schools :: Charter Schools | Kura Hourua

Methodology / Modelling Logic

The calculator uses the most current funding formulas and rates, reflecting the latest approved updates. These rates are aligned with the most recent information available.

Guide

Worksheets Overview

The calculator consists of three main worksheets:

1. Input

This worksheet includes two sections:

School Details: Users input school details in the designated **orange cells**.
Some cells have defined parameters (e.g., EQI values within a specific range), TRUE/FALSE options, and dropdown lists.
Data Dictionary: Provides detailed explanations of all input variables.

2. Output

This worksheet also includes two sections:

Estimated Full Year Entitlement: Displays the estimated **2025 calendar year funding**, calculated based on the input variables.
Data Dictionary: Explains each sub-component of the funding model.

Note: Key details, such as the capital maintenance funding rate for schools on sponsor-owned property, will be updated in **November**.

3. Services

This worksheet contains the following table:

CASHED UP SERVICES: Includes all nationally available services that are being "cashed-up" and included in the **Services** component of the **Output** worksheet.

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School Details

Orange Input Cells: For entering school-specific details.

	Input
School Type	Primary
New School	FALSE
Property Type	Ministry owned
Area Classification	Major urban centre
EQI	486
Vandalism Risk	Not Qualify
Inclusion in Risk Management Scheme	FALSE
Inclusion in Donations Scheme	FALSE
Isolation Index	-

School Roll By Year Level

Count of Students by Year Level

Year Level	Count
Year 1	-
Year 2	-
Year 3	-
Year 4	-
Year 5	-
Year 6	-
Year 7	-
Year 8	-
Year 9	-
Year 10	-
Year 11	-
Year 12	-
Year 13	-

Māori Language Programmes

Number of learners in Māori language Programmes by level

Level 1	-
Level 2	-
Level 3	-
Level 4	-

Pacific Language Programmes

Number of learners in Pacific language Programmes by level

Level 1	-
Level 2	-

Data Dictionary

Variable Name	Description	Data Format	Allowed Values	Notes	Relevant Ministry Links	Additional Info
School Type	Type of school.	Defined options	[Primary, Secondary, Composite]	Select the appropriate type from the predefined list.Primary schools cover years 1 through 8, secondary schools encompass years 9 through 13, and composite schools include years 1 through 13.	https://parents.education.govt.nz/primary-school/schooling-in-nz/different-types-of-primary-and-intermediate-schools/	https://www.legislation.govt.nz/bill/government/2024/0066/latest/LMS965363.html?search=sw_096be8ed81e5a7f4_primary_25_se&p=1&sr=0
New School	Indicates whether the school is newly established.	True/False	True or False	Set to True if the school is a new school; otherwise, set to False.		
Property Type	Type of property ownership.	Defined options	[Ministry-owned, Sponsor-owned, Leased from a third party]	Choose the property type from the list of predefined options.		
Area Classification	Classification of the area where the school is located.	Defined options	[Major urban area, Other]	Select the appropriate area classification.		
EQI	Equity Index of the school.	Integer	Positive integers between 344 and 569 (e.g., 344,345,346, ...)	Enter the Equity Index as a positive integer. The 2024 average is EQI is 461.	https://www.education.govt.nz/our-work/changes-in-education/equity-index/	
Vandalism Risk	Indicates if the school is at risk of vandalism.	Defined options	[Low Risk, Medium Risk, High Risk, Critical Risk, Extreme Risk, Not Qualify]	Ministry will provide schools vandalism risk rating	https://www.education.govt.nz/school/funding-and-financials/resourcing/operational-funding/operational-funding-components/#Vandalism	
Inclusion in Risk Management Scheme	Indicates if the school is included in the Risk Management Scheme.	True/False	True or False	Set to True if the school is included in the Risk Management Scheme.	https://www.education.govt.nz/school/funding-and-financials/resourcing/operational-funding/the-risk-management-scheme-contents-and-liability-insurance/	
Inclusion in Donations Scheme	Indicates if the school is included in the Donations Scheme.	True/False	True or False	Set to True if the school is included in the Donations Scheme. EQI has to be higher than 431 to be eligible for the scheme.	https://www.education.govt.nz/school/funding-and-financials/fees-charges-and-donations/	
Isolation Index	Isolation Index of the school.	Integer	Postive Number between 0 and 23 (e.g., 0, 0.1,0.2 ...)	Enter the Isolation Index as a positive Number. The average isolation index in 2024 is 0.79.	https://www.education.govt.nz/our-work/changes-in-education/equity-index/faq-isolation-index-changes/	
School Roll By Year Level	Number of students enrolled in the school by year level.	Integer	Positive integers (e.g., 0, 1, 2, ...)	Enter the total number of students by each year level.	https://www.education.govt.nz/our-work/our-role-and-our-people/education-in-nz/#:~:text=The%20education%20system%20for%20schools,%E2%80%9317%20years%20of%20age).	
Māori Language Programmes	Count of students in Māori Language Programmes by immersion level.	Integer	Positive integers (e.g., 0, 1, 2, ...)	Enter the count of students enrolled in Māori Language Programmes by level.	https://www.education.govt.nz/school/funding-and-financials/resourcing/operational-funding/operational-funding-components/#Maori	
Pacific Language Programmes	Count of students in Pacific Language Programmes by immersion level.	Integer	Positive integers (e.g., 0, 1, 2, ...)	Enter the count of students enrolled in Pacific Language Programmes by level.	https://www.education.govt.nz/school/funding-and-financials/resourcing/operational-funding/operational-funding-components/#Pacificbilingual	

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Estimated Full Year Entitlement

2025 Calendar year (inclusive of Entitlement funding where applicable)
Figures are provisional and subject to change

Salaries		
First students	$	-
Extra Students	$	-
Māori Immersion	$	-
Pacific Immersion	$	-
Total	$	-

Operations		
Base Funding	$	-
Relief Teacher funding	$	-
Heat Light and Water funding	$	-
Equity Funding (EQI)	$	-
Support for Inclusion (SIF) previously SEG	$	-
Careers Information Grant (CIG)	$	-
ICT Funding	$	-
Targeted Funding for Isolation	$	-
Per-Pupil Funding	$	-
KiwiSport	$	-
Māori Language Programme	$	-
Donations Scheme	$	-
Pacific Bilingual and Immersion Funding	$	-
STAR Funding	$	-
Risk Management Scheme Premium	$	-
Vandalism	$	-
Non-teacher top-up funding	$	-
Total	$	-

Services		
Payroll	$	-
Professional Learning and Development (PLD)	$	-
Digital	$	-
Total	$	-

Establishment		
Operational Funding	$	-
Senior Management Funding	$	-
Funding for Remaining Staff	$	-
Initial furniture and equipment funding	$	-
Initial Fit-out	$	-
Information Technology	$	-
Total	$	-

Property		
Property Maintenance	$	-
Furniture and Equipment	$	-
Capital Maintenance and leased-based funding*	$	-
Total	$	-

** For schools on Ministry-owned property, a minimum of 70% must be spent on capital maintenance*

Total Entitlement	**$**	-

Data Dictionary

Component	Sub-Component	Description	Notes	Further Information
Salaries	**First students**	Salaries Funding for the first 100 Primary students or first 200 for Secondary/Composite.	Staffing-based funding is provided as a per-student cash rate, calculated based on the estimated staffing entitlement for similar State schools, varying by school type. Under the agreed funding model, charter schools receive higher rates for the first 100 students in primary schools and the first 200 students in secondary and composite schools, reflecting the "base staffing." For any additional (extra) students—those beyond 100 in primary schools or beyond 200 in secondary and composite schools—a lower rate is applied.	https://www.charterschools.govt.nz/assets/Uploads/20240812-CSA-funding-factsheet.pdf
Salaries	**Extra Students**	Salaries Funding for additional students above the first 100 (Primary) or 200 (Secondary and Composite).	Staffing-based funding is provided as a per-student cash rate, calculated based on the estimated staffing entitlement for similar State schools, varying by school type. Under the agreed funding model, charter schools receive higher rates for the first 100 students in primary schools and the first 200 students in secondary and composite schools, reflecting the "base staffing." For any additional (extra) students—those beyond 100 in primary schools or beyond 200 in secondary and composite schools—a lower rate is applied.	https://www.charterschools.govt.nz/assets/Uploads/20240812-CSA-funding-factsheet.pdf
Salaries	**Māori Immersion**	Salaries Funding for Māori Immersion.	To reflect the additional resourcing state schools receive, a model was used to determine the per-pupil rate for the equivalent cashed-up funding. Note that this is based on the number of Māori immersion students.	https://www.charterschools.govt.nz/assets/Uploads/20240812-CSA-funding-factsheet.pdf
Salaries	**Pacific Immersion**	Salaries Funding for Pacific Immersion.	To reflect the additional resourcing state schools receive, a model was used to determine the per-pupil rate for the equivalent cashed-up funding. Note that this is based on the number of Pacific immersion students.	https://www.charterschools.govt.nz/assets/Uploads/20240812-CSA-funding-factsheet.pdf
Operations	**Base Funding**	Base funding to assist with the fixed costs associated with the operation of a school.	To reflect the additional resourcing state schools receive, a model was used to determine the per-pupil rate for the equivalent cashed-up funding.	https://www.education.govt.nz/school/funding-and-financials/resourcing/operational-funding/operational-funding-components/
Operations	**Relief Teacher funding**	Funding to help with the payment of salaries and allowances for relief teachers.	For state schools, this is generated based on the number of teaching positions eligible for relief teacher funding. A model was used to determine the per-pupil rate for relief teacher funding.	https://www.education.govt.nz/school/funding-and-financials/resourcing/operational-funding/operational-funding-components/#Relief
Operations	**Heat Light and Water funding**	Funding to support with the costs of power, fuel and water.	Operational funding for heat, light and water is for: electricity (supply, capacity and line charges) energy costs for sewage schemes and water supply (self-supply schools) gas, reticulated and portable, including delivery and canister hire coal and wood, including delivery costs water supply rates. A model was used to determine the per-pupil rate for Heat, Light and Water funding.	https://www.education.govt.nz/school/funding-and-financials/resourcing/operational-funding/operational-funding-components/#Heat
Operations	**Equity Funding (EQI)**	Funding aimed at supporting schools which face socio-economic barriers that impact student achievement.	We provide schools and kura with equity funding, in addition to their core funding, so they can work in different ways to reduce the impact socio-economic factors have on student achievement.	https://www.education.govt.nz/our-work/changes-in-education/equity-index/how-the-equity-index-applies-to-funding/
Operations	**Support for Inclusion (SIF) previously SEG**	Funding to schools to support students with moderate education needs.	Support for inclusion funding, which was previously called the special education grant, helps you to support students with moderate special education needs, such as learning and behaviour difficulties.	https://www.education.govt.nz/school/funding-and-financials/resourcing/operational-funding/operational-funding-components/#Inclusion
Operations	**Careers Information Grant (CIG)**	Funding to support year 9+ students.	The careers information grant assists with the provision of careers information and guidance for schools with Year 9 to 13+ students.	https://www.education.govt.nz/school/funding-and-financials/resourcing/operational-funding/operational-funding-components/#Careers
Operations	**ICT Funding**	ICT funding to support hard/software.	Information and communication technology (ICT) funding to help schools buy hardware and software.	https://www.education.govt.nz/school/funding-and-financials/resourcing/operational-funding/operational-funding-components/#ICT
Operations	**Targeted Funding for Isolation**	Support for costs associated with isolation.	If your school is in an isolated area, you may be eligible for additional operational funding called 'targeted funding for isolation'. This funding helps schools whose isolation means that they have additional costs associated with accessing goods and services needed to operate their school and deliver the curriculum. A new Isolation Index was implemented in January 2023.	https://www.education.govt.nz/school/funding-and-financials/resourcing/operational-funding/operational-funding-components/#Isolation
Operations	**Per-Pupil Funding**	Operations funding based on year levels of students.	We set 4 levels of per-pupil funding to recognise the cost of curriculum delivery at each level. We calculate per-pupil funding using the number of students on a school's roll. Per-pupil rates are universal and apply to all schools.	https://www.education.govt.nz/school/funding-and-financials/resourcing/operational-funding/operational-funding-components/#Perpupil
Operations	**KiwiSport**	Funding to support and promote sports.	KiwiSport is a Government funding initiative that promotes sport and aims to increase opportunities for school-aged students to participate in organised sport. KiwiSport provides funding for schools with Year 1 to 8 and Year 9 to 13 students.	https://www.education.govt.nz/school/funding-and-financials/resourcing/operational-funding/operational-funding-components/#Kiwisport
Operations	**Māori Language Programme**	This funding is for students enrolled in Māori language programmes that meet all the criteria for 1 of 4 immersion levels.	Although Māori language programmes have 6 levels that may be reported in your roll returns, only students enrolled in Levels 1 to 4 (including 4a and 4b) generate funding. Visit our operational funding rates page for Māori language programme funding rates.	https://www.education.govt.nz/school/funding-and-financials/resourcing/operational-funding/operational-funding-components/#Maori
Operations	**Donations Scheme**	Funding to schools that opt into the scheme (that choose not to receive donations).	schools with an ECI of 432 or higher can choose to receive a per-student payment per year if they agree not to ask parents and caregivers for donations (except for overnight camps).	https://www.education.govt.nz/school/funding-and-financials/fees-charges-and-donations/
Operations	**Pacific Bilingual and Immersion Funding**	This funding is for students enrolled in Pacific language programmes that meet all the criteria for Level 1 or Level 2 immersion levels.	Although Pacific language programmes have 4 levels that may be reported in your roll returns, only students enrolled in Levels 1 or 2 generate funding. Visit our operational funding rates page for Pacific bilingual and immersion programme funding rates.	https://www.education.govt.nz/school/funding-and-financials/resourcing/operational-funding/operational-funding-components/#Pacificbilingual
Operations	**STAR Funding**	Secondary-tertiary alignment resource (STAR) funding. Used to support year 11-13 students through accessing courses and career-related experiences.	Note: this is based on the existing 2024 rate. The 2025 rate will be published later in the year. STAR funding is a capped resource available to schools with Year 11 to 13+ students. STAR funding is based on STAR funding units, which we allocate to eligible schools. Our initial STAR funding estimate uses your school's provisional resourcing roll, (excluding adult students) for Years 11, 12 and 13+. We calculate STAR funding units quarterly according to our quarterly roll count policy. Each Year 11, 12 and 13+ student generates one STAR unit. Teen parent units will be weighted at 1.5 units per student. If your school has less than 30 units, then we allocate your STAR funding at the rate per unit listed in the operational funding rates. If your school has more than 30 units, we allocate your first 30 units using the base rate and the remainder using the additional STAR funding unit rate.	https://www.education.govt.nz/school/funding-and-financials/resourcing/operational-funding/operational-funding-components/#star
Operations	**Risk Management Scheme Premium**	Risk management scheme that schools can pay to join.	Our risk management scheme is a non-profit scheme that offers comprehensive contents, liability and cyber insurance for your school. Your school can choose to insure with a private insurance company or join this scheme. All school assets, other than land and buildings owned by the Crown, must be insured.	https://www.education.govt.nz/school/funding-and-financials/resourcing/operational-funding/the-risk-management-scheme-contents-and-liability-insurance/
Operations	**Vandalism**	Funding included each year in your operational funding to repair damage caused by vandalism.	The amount paid to your school is calculated in categories based on the number of pupils and the risk of vandalism in your area (determined by previous vandalism costs).	https://www.education.govt.nz/school/funding-and-financials/funding/vandalism-funding/
Operations	**Non-teacher top-up funding**	Schools are funded additional increases to their operational grants to meet the cost of non-teaching staff pay increases.	The equivalent per-pupil funding rate was modelled based on actual funding to State schools.	https://www.education.govt.nz/school/funding-and-financials/resourcing/non-teaching-staff-settlements-and-funding/
Services	**Payroll**	Cashed-up equivalent to payroll services that are received by state schools.	Per-student funding rate based on cost of services for State schools.	https://www.charterschools.govt.nz/assets/Uploads/20240812-CSA-funding-factsheet.pdf
Services	**Professional Learning and Development (PLD)**	Cashed-up equivalent for nationally provided PLD opportunities provided for improved quality teaching and learning, support and resources for teachers, curriculum support and professional development and support.	Per-student funding rate based on cost of services for State schools.	https://www.charterschools.govt.nz/assets/Uploads/20240812-CSA-funding-factsheet.pdf
Services	**Digital**	Cashed-up equivalent to digital software, network infrastructure, support systems, digital content and resources, cyber security measures and infrastructure management tools.	Per-student funding rate based on cost of services for State schools.	https://www.charterschools.govt.nz/assets/Uploads/20240812-CSA-funding-factsheet.pdf
Establishment	**Operational Funding**	Broadly equivalent per-pupil funding with State Schools. Covers the three parts of the operational component for establishment funding: Administration grant, Library/Resource Centre grant and Learning and Teaching grant.	The base and per-pupil funding components of the Operational component of establishment grants has been converted into per-pupil rates.	
Establishment	**Senior Management Funding**	Funding is provided for senior staff broadly equivalent to what is funded for state schools for 2024 Q3.	Establishment staffing allows for roles to be employed prior to the school starting in order to prepare for opening. Funding is cashed-up for broadly equivalent roles that are funded at State schools. The roles cashed-up include; Principal, Senior Management and Senior heads of Department (only applicable for secondary and composite schools).	
Establishment	**Funding for Remaining Staff**	For Q4 2024: staffing broadly equivalent to what a State schools would receive is cashed-up, this includes both senior staffing and regular teachers.	State schools are entitled to teaching staff for the quarter prior to opening. Broadly equivalent entitlement has been cashed-up to allow Charter schools equivalent entitlement.	
Establishment	**Initial furniture and equipment funding**	Funding to fit-out new schools with furniture and equipment.	New State schools receive initial furniture and equipment funding based on the net areas of their "standard" and "specialised" spaces. Estimates were made of the space make-up of new charter schools, and a model was fit to calculate broadly equivalent funding.	
Establishment	**Initial Fit-out**	Funding to meet general fit-out costs for new schools.	For 2025 the rates for fitout are set at half the annual notional lease-based funding rates, with respect to schools in a "General" area (ie not a major urban area) in the school year before the school opens. This is broadly equivalent to the fit-out funding for a new state (non-integrated) school. The rates would apply to any new charter school. New state schools receive establishment ICT funding to purchase ICT equipment such as servers, wireless access points, printers, and monitors. As in state schools, this funding would be provided to charter schools at a flat per-student rate, not a stepped rate.	
Establishment	**Information Technology**	Funding for new Information Technology.		
Property	**Property Maintenance**	Funding to pay for maintenance of property. Funding doesn't cover capital work or operational non-property expenses.	A model was fit based on actual funding of State schools, giving rates for the different school types and first and additional students.	https://www.education.govt.nz/school/funding-and-financials/funding/property-maintenance-grant/#:~:text=The%20property%20maintenance%20grant%20is,along%20with%20your%20operations%20funding.
Property	**Furniture and Equipment**	Funding for the renewal of furniture and equipment.	Funding has been determined as a percentage of Year 1 capital maintenance funding (20% of full capital maintenance funding for a charter school on Ministry property).	https://www.education.govt.nz/school/funding-and-financials/funding/furniture-and-equipment-funding-for-schools/
Property	**Capital Maintenance and leased-based funding**	Funding for capital maintenance for schools on Ministry or sponsor-owned property or lease-based funding for schools on property leased from a landlord.	Capital maintenance and Lease-based funding is determined by the Property Type of the school, whether the property is Ministry owned, sponsor owned or leased from a landlord. Capital maintenance funding to school on Ministry property were modeled on existing capital maintenance funding to state schools. Capital maintenance funding to schools on sponsor owned property has been set to the existing per student rate as to the proprietors of state integrated schools (note the 2025 rate will be published at the end of November, so the 2024 rate is currently used). For schools on leased property, the rate was modeled on the notional lease of state school properties against their school rolls.	https://www.education.govt.nz/school/funding-and-financials/funding/capital-funding-for-integrated-schools/#:~:text=Paying%20for%20capital%20work%20at,capital%20maintenance%20and%20modernisation%20projects.

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Current Description	Grouping
All inclusive cost for Payroll services including technology maintenance and improvements. It does not include Ministry-run remediation programme which is not a service provided to schools.	Payroll
This service provides online modules for aspiring and beginning principals to learn about core functions, skills, and knowledge requried to be an effective principal	Professional Learning and Development
The PCC OTT support for mentor contract aims to provide participants with the appropriate supports to assist with gaining full certification and making a successful start to their teaching career in New Zealand	Professional Learning and Development
The PCT OTT suport for mentor contract aims to provide participants with the appropriate supports to assist with gaining full certification and making a successful start to their teaching career in New Zealand	Professional Learning and Development
A PLD Support that is delivered in person and online. It is aligned to the curriculum change programme through the Programme's Reading Intensive Practice, and Digital Fluency Intensive components and a maths intensive practice pilot that will be fully implemented from 2024	Professional Learning and Development
Provides guidance and targeted support to principals in the first 2-3 years of their time in the role	Professional Learning and Development
For aspiring and beginning principals to learn about core functions, skills and knowledge required to be an effective principal	Professional Learning and Development
Provide schools with software licences	Digital
Provide schools with software licences that include the Microsoft 365, windows operating system and minecraft	Digital
TELA+ is a digital device leasing scheme for eligible teaching staff in state and state-integrated schools	Digital
N4L encourages all schools and kura with a N4L Managed Network connection to use our safe and secure internet service with our recommended settings to provide students with a baseline level of protection while learning online at school.	Digital

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Notifications for Applicants

Notification No. 1.0 | **Date:** 19 September 2024

New information for applicants:

Item	Description	Addenda Document Name
Briefing documents	Attached to this notification is the applicant briefing document. It contains: 1. the briefing slide pack 2. the transcript of presenter notes. It does not include: the questions and answers from the briefing. Answers were provided live in the chat function to many questions however we are compiling them all into a document which we will share with you shortly (some are in this document with the remainder to follow).	*CSKH Stage Two Application - Applicant Briefing 17.09.2024* and *CSKH Stage Two Application - Transcript of Briefing Notes*
Response Form	In part three, question 9, please note that we have updated the question for you to include details about your payroll solution.	*05. CSKH Stage Two Application - Response Form V2*

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	In part four where you may propose amendments to Specific Terms of the Agreement, please note that we do not require input of contract content (or populating of the contract) but are recommending you document in the **Response Form** any points for discussion that you wish to raise during contract negotiations.	This supersedes the previous version of the Response Form supplied.
Performance Management Framework	The performance management framework including the targets have now been announced and are on our website: About Performance Management - Charter Schools | Kura Hourua A3 - Performance Management Framework We have updated the application Measures and Targets document accordingly. While the framework notes that the annual self-audit will occur in June, please note that this is flexible and will be included in the agreement as specified dates, for example: • relevant period: previous school year and 1 January to 30 June of current school year • due date: 30 Sept (to provide 3 months to complete)	*03. CSKH Stage Two Application - The measures and targets V2* This supersedes the previous version of the Measures and Targets document supplied.
Entitlement calculator	If you have an older version of excel, the calculator may show errors for you. If this happens, please try this version which has been designed to work for older versions.	*Appendix C. CSKH Stage Two Application - 2025 Charter School Entitlement Calculator (compatible version)* **Please only use this version if the original calculator does not work for you. The data validation rules in the**

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	Functionally, this has been designed to work identically to the previously provided calculator.	**original version reduce the likelihood of errors compared to the compatible version.**

Questions received from applicants via GETS and email:

Question Topic	Answer
Number of applicants advancing to stage two • What percentage of groups advanced from round one to the second round? • How many will be selected in this round compared to those who won't? • Could you also provide the percentage of participants who have reached this stage and how many will move on to the contract phase? Given the significant time, planning, and personal financial investment required for this stage, we need an estimate of our chances of success.	Whilst we can't share the exact numbers of applications that have progressed to stage two, we can say that approximately 40% of the 78 applications received have been progressed from stage one to stage two. The Authorisation Board, when appointed, will determine who will be approved to negotiate a contract with the Charter School Agency noting that the funding announced allows for the establishment of 15 **new** schools over 2025 and 2026.
Educational achievement Are there any plans to assess whether students at charter schools attain a higher standard of educational achievement than "like" students attending a state school?	We are still working through how we will report the achievement of students at charter schools against the achievement results of students at other State schools.
Are adjustments to our stage one application allowed? For example, can we expand on our original application and increase the student roll and the age range, or adjust the curricula, as we discover new	Yes, we have allowed a section in the Response Form (part five) where you can document changes to your stage one application.

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initiatives and curricula suitable for our vision and pedagogical approach?	
Securing staffing How will we secure staff after November 4th (if we succeed in the second round), when we can't offer them any commitment until then? There does not seem like a realistic amount of time from the week of November 4th to Term 1 2025. Please confirm how you intend to support this process and timeframes and help us meet these goals so we can be ready.	We understand it is an ambitious timeframe. The Authorisation Board can only be appointed once the legislation passes, which will hopefully happen next week. We hope to let you know the Board's decisions on applications in early November. We will work to support you through the establishment phase in November-December 2024 and January 2025.
Support partners Who are the support entities available to us, and when will we be able to engage with them? Will we have a specific person or group allocated to us from whom we can seek support in a regular and timely manner?	We will be sharing details of the support arrangements with you all very soon. We will be in contact with you individually to discuss.
First year funding Please confirm our understanding - the funding provided is based on the projected roll for the school in its fifth term, and funding begins at this rate from when the contract is signed in November, even if in Term 1, we do not have that exact number of students attending.	It is provided on the projected number that you think you will have in your fifth term and will be agreed in your contract. Note that while staffing-based and property funding for a new school will be based on the establishment roll (Term 5), decisions are being made about the operational grant-based and cashed-up services components. Year 1 funding will be paid on or shortly after 1 January 2025. We are aiming to pay Establishment funding as soon as possible after a contract is signed.
The Agreement "Sponsors will need to comply with both the Agreement and the applicable Regulatory Framework". Where are these agreements and frameworks?	The Agreement is almost complete and undergoing a final review before we share it with you. It will be posted on GETS as soon as it is ready.
Performance Management Framework	The Performance Management Framework (PMF) has now been announced by the Minister and is available here. We have provided an

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Please confirm if the "Performance Plan / Performance Management Framework" will be provided to us, or do we need to create this for ourselves?	updated “Measures and Targets” document following the Ministerial announcement. A Performance Management Plan is a component of the Agreement and will reflect the PMF. We will provide a draft of this to you along with the draft model Agreement. We want to see your strategy for meeting the PMF in your application.
Submitting a response The application advises that the applicant must respond using the application response form through the correct channel and in the correct format. There were issues with loading applications via GETS for stage one. Please clarify and confirm there is only one way to format and submit the application this round.	The application submission instructions are the same as stage one. By correct format, we mean that all questions are answered, and the document file type is suitable. This doesn't prevent you from updating the document to suit your look and feel. Our preference is to receive all applications through GETS, as was the expectation for stage one. The email inbox is an option if you have issues. Please give yourself plenty of time to submit since GETS can encounter issues with a large number of responses.
Entitlement calculator errors The spreadsheet that was included in the documentation seems to have errors. Inputs going in but a lot of errors in the output cell are showing "Formula parse error"	We have looked into this and have identified that this issue is due to older versions of excel operating a bit differently. We have shared a version of the calculator that will work for older versions of excel.
Reporting We will be operating an "extended hours" model to accommodate the work and other commitments some students which means that not everybody will be in "period 1 math’s" in the period 1 timeslot. We are concerned that using KAMAR will not reflect what we regard as attendance. Can you advise?	Sponsors will be responsible for recording and reporting learner attendance, and how this is to be completed may vary across charter schools. (in some circumstances, KAMAR has the capability of being updated retrospectively.) The Charter School Agency will work with sponsors that are operating with different operating day, hour, and term settings to determine how attendance should be reported and monitored and to inform the Ministry of Education and the Authorisation Board.

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School lunches Has it been confirmed if the school lunch programme will be eligible in charter schools or provided via cashed up funding?	This is one of the list of services that charter schools will be able to apply for – it is not included in the cashed up amount for services. Charter schools will need to meet the same requirements as state schools for this service. However, please consider that this may not be available in time for schools opening at the beginning of term 1 2025.

Questions received from applicants during the teams briefing for applicants:

Question Topic	Answer
For lease-based funding if we are entitled to an amount based on student numbers but negotiate a lease for a lesser amount can we retain the difference in reserves. e.g**.** Entitled to $175k but negotiate a lease for $170K - can we keep the $5k in reserve or will we only receive $170K?	The funding is provided as a cashed-up amount per student. The sponsor has the autonomy to spend it how they see fit.
For new charter schools (that do not currently have EQI, Vandalism risk or isolation risk values), how do we estimate what these inputs should be?	There are some links to the MoE website where these can be obtained to estimate, noting that iterative work is expected on the calculator.
Just to clarify, the ear-marked categories e.g. kiwi sport are just to go into the overall fund and there is flexibility with how that money is spent?	That is correct. That is operational funding and will be cashed up with autonomy for the sponsor on how this is spent.
Is the roll based on start or end of the 1st year.	The year 1 roll is your estimate of the term five roll.
Establishment funding is based on Term 5 roll (likely to be February 2026). Will this be paid as a one-off payment in 2024?	Yes. It will be paid as soon as possible after a contract is signed.
If the school is in ramp up mode and the student numbers may start the year at 15 students and end the year at 100 students, how is this handled within the model and what is the sensitivity for enrolment growth	Contingent on a sponsor agreeing to the roll returns process, we expect to be reactive to roll changes. The salaries and property in the first year will be based on the establishment roll, but decisions still need to be made about the operational grant-based and cashed-up services components.

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Does the predicted roll for term 5 of opening apply to the first day of opening in a similar way that it would for a new state school?	Yes.
For the EQI index, this is based on socio-economic factors. But how are educational disadvantages faced by [non-ORS] e.g**.** neurodiverse students addressed?	Existing student-level resourcing like ORS is not captured here. High learning needs can still be obtained per student.
Is there a minimum roll required to open the doors in Term 1 2025	There are no minimum or maximum rolls outlined in policy. Discussions around anticipated rolls would occur during contract negotiations.
What is the funding mechanism if a new charter school wants to offer the students services which are currently not offered within public schools	Charter schools will receive cashed-up funding to cover property, services, staffing and operations. They will have autonomy about how this funding is spent. There is one exception for converting schools that occupy Ministry-owned property: at least 70% of capital maintenance funding must be spent on projects that create Crown assets.
For new charter schools, what is the funding mechanism for future capital expenditure funded, outside of anything related to property - i.e. computers	Funding for ICT is one component of the cashed-up operations funding. The sponsor has autonomy on how this funding is spent.
Will there be a Sponsor interview or interactive as part of the assessment process or will it be based entirely on the written application?	We expect this round will be based on your written application. However, the Authorisation Board, when appointed, may want to undertake further activities such as in-person interviews.
Will the same attendance codes apply? We live in an isolated and remote place, whereby sometimes students cannot physically attend due to weather conditions (they live on outer islands). Could we do learn from home codes too like there are currently?	Sponsors will be responsible for recording and reporting learner attendance. How this is to be completed may vary across charter schools. The Charter School Agency will work with sponsors that operate a charter school with different student management systems to determine how attendance should be reported and monitored and to inform the Ministry of Education and the Authorisation Board.

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Can we expect any feedback from Round 1 Application? e.g. - any assumptions that need altering?	Yes, we understand you will want the feedback from stage one to inform your stage two application. Please email your interest to applications@charterschools.govt.nz
Do registered teachers need to have a current practicing certificate to be counted within the 75% criteria or could they be in the process of getting this	Staff who are employed in teaching positions will need to hold either a Limited Authority to Teach or be certificated, and sponsors will need to meet their contracted minimum percentage. If a teacher is in the process of obtaining their certification and this teacher needs to hold certification for the sponsor to meet their minimum percentage requirement, then this would mean a sponsor is in breach of their contract. However, if the charter school has not yet opened and the sponsor knows that an employed teacher is in the process of obtaining certification, we expect that the sponsor would ensure the teacher has obtained their certificate by the time the school is open in time for teaching, so that they can meet their required minimum percentage. The Charter School Agency will be responsible for monitoring how charter schools are meeting the minimum percentage of certificated teachers.
I understand that only 10 state schools have applied, does this means that the charter board is considering increasing the number of new charter schools that will be accepted to make up the total 50?	Funding is over a two-year period -2025 and 2026 and is for up to 15 new and up to 35 converting schools. There is some flexibility within this funding. The mix of schools will be a decision for the Authorisation Board based on the quality of applications and budget available.
Are we allocated a specific support person for our application or is there general support available from the Charter School Agency?	We will be sharing details of the support arrangements with you all very soon. We will be in contact with you individually to discuss.
Will performance be measured by way of progress rather that measured again national targets?	Standardised achievement targets will be set across all charter schools. These provide a system-level goal and expectations for charter schools to strive towards in the long-term. The minimum performance thresholds for each school are based on their school-level Equity Index. These thresholds ensure that targets are fair

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	and account for the different starting points and circumstances for individual schools and their students. The standardised targets and performance thresholds allow schools to set high goals to lift student achievement, while recognising that schools and students who face greater socio-economic barriers may need more time to improve.
When will the announcement be made?	The announcement was made today, Thursday 19 September 2024. Please see the Ministers announcement on targets: Tough targets for charter schools will raise achievement | Beehive.govt.nz

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Date and time

17 September 2024 | 3:30pm

Method

Microsoft Teams Meeting

Organiser

Charter School Agency

Attendees

Chris Richards - Chief Advisor
Helen Saville - Principal Procurement Specialist
Sam Snell - Senior Analyst
Sponsors invited to stage two

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Charter School Agency

Karakia tīmatanga

Ka Hikitia! Ka Hikitia!	*Encourage and support!*
Hiki, Hikitia!	*And raise it to its highest*
Whakarewa ki runga rawa	*Ensure that high achievement is maintained*
Herea kia kore e hoki whakamuri mai	*Holdfast to our Māori potential*
Poua atu Te Pūmanawa Māori	*Our cultural advantage*
He Mana Tikanga	*And our inherent capability*
Me te uri o Māia	*Nurture our young generation*
Poipoia ngā mokopuna	*The leaders of the future*
Ngā rangatira mō āpōpō	*Behold, we move onwards and upwards!*
Ka tihei! Tihei mauriora!	

Opened with karakia by Chris Richards

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Agenda

Karakia, introductions and welcome	Chief Advisor, Chris Richards
Application process stage two	Applications lead, Helen Saville
Application key topics • Assessment criteria • Funding calculator • Performance	Applications lead, Helen Saville, Funding lead, Sam Snell
Next steps	
Questions and Answers	
Karakia, closing and thanks	Chief Advisor, Chris Richards

Introduction to co-presenters Helen Saville and Sam Snell by Chris Richards

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Housekeeping

- Use the chat function for your questions.
- We will answer these at the end of this session.
- Anything asked today and in future sessions will be published on GETS.
- GETS will be open for further questions until 4 October 2024.
- **Please direct all communication through GETS**.

Kia ora everyone, welcome to the Stage Two Applicant briefing. In this session we have the mics and the cameras disabled, but we are more than happy to take questions via this chat function and will respond here today where we can or provide an answer to you later in the week.

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Application process

Progressing from stage one

Advancing applications have demonstrated potential to meet the criteria necessary for establishing a successful charter school.

Stage two

- Builds on your stage one application.
- Requires more detail regarding your capability and operational fitness
- Demonstrates your contribution to the wider school network.

Please note:

- There are more applicants in stage two than there are places available.
- Completing stage two does not guarantee future approval.

As you know we had 78 applications assessed in stage one. 40% of those have been invited to continue through to stage two noting that up to 15 new schools will be approved for 2025 and 2026 once the Authorisation Board is appointed.

We asked a lot of detail from you in stage one and with stage two, we want to build on the information you have already provided with greater focus on you as the sponsor with your capability and operational fitness.

In stage one we asked how your school would uplift academic achievement and attendance and now we want you to demonstrate your place and contribution within the wider school network.

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Application documents

- Overview
- What you'll get in funding
- The measures and targets
- Our timeline and approach to assessing applications
- Response Form
- T&Cs, Glossary, Calculator
- Contract (**Pending**)

We opened stage two of the process to invited applicants on Wednesday 11 September. The application is broken into bite-size documents with specific information in each:

• Overview	General information about the application
• What you'll get…	Funding entitlements/calculator, contract arrangement, support function
• Measures and targets	Performance management framework, monitoring, interventions
• Timeline and approach	Application timeframes, assessment criteria, assessment method
• Response form	Questions, changes to stage one, proposed amendments to contract, application declaration
• T&C's and glossary	Both of these have had minor updates since stage one
• Funding calculator	A tool for you to use to calculate your entitlement
• Contract	This is pending final updates but we expect to have it out this week

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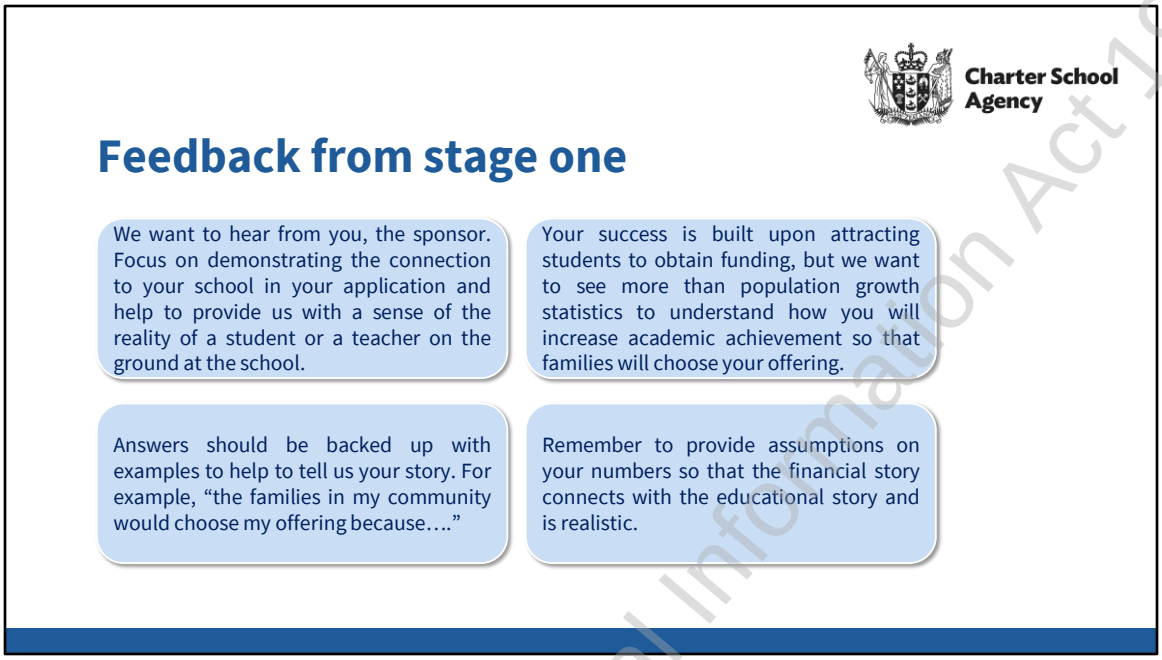

In stage one, we noticed some common themes across all applications, and we want to share these with you to help you with your stage two applications.

It is important that your application speaks to you as the sponsor. Remember even with any support you might receive to put your application together that this is what the panel and Board will be looking at to differentiate the good applications from the excellent applications.

Many applications could speak well to the data and what is needed, what wasn't always so clear was how the establishment of the school responds to that need and is embedded in the community. We want to see how that translates to families choosing your school.

That can be applied across a lot of scenarios – put yourself in the shoes of a family or student and tell us why they would choose your offering. What is it that sets you apart and offers something that is attractive and attainable?

Lastly, the financials need to be solid; gaps/ lack of clarity may indicate you're not ready/haven't considered aspects. We need to see how your financials tie together with the educational narrative and are realistic, feasible and comprehensive.

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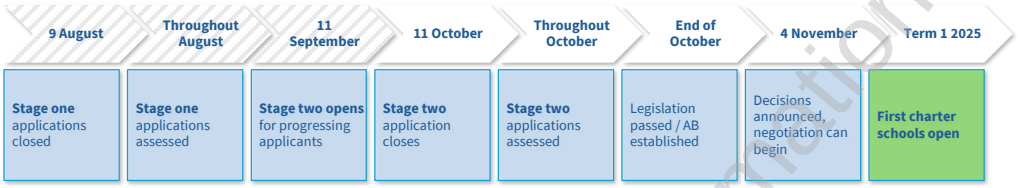
Application key timeframes



We're on-track with our timeframes and have had very little deviation from what we proposed in stage one. We know that these timeframes are going to be challenging for some applicants.

However, we've invited you to stage two because your application has considerable potential and you have indicated an ability to open for 2025. If you have any concerns about your ability to open term one 2025, now is the time to start signalling that so that we can support you to achieve this, also noting that for those who are not successful in this first round, it doesn't necessarily mean that it's the end of the road.

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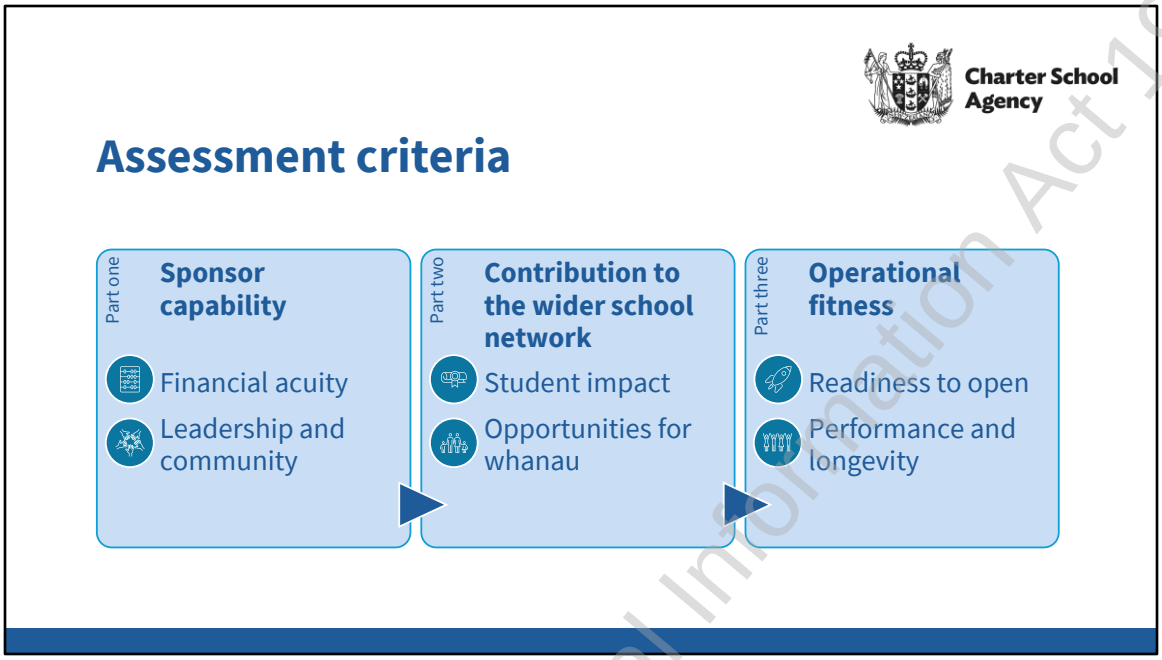

The criteria is split into three parts, and the volume of questions is low; we want you to focus on the detail.

Looking at capability across a financial and sponsor leadership lens. We know that creating a P&L is straightforward but we also want you to demonstrate how you will use it to manage your financial and business performance.

The school network section is to understand how you as the sponsor will lead by example to attract/retain families to provide benefits those students. Remembering that charter schools are a part of the wider system, think about your impact on the system. When a student leaves your school, what will they leave with and how will that inform and impact the experiences of future students and families?

With operational fitness, there are two key parts to this. The first is that we want to understand if you are ready to open. We want to know if your systems are ready, and your infrastructure is in place so that a student could turn up for class on day one of term one 2025 and they would be safe and learning.

The second part is considering the longevity of your proposal. In 10 years, where will your school be and what will you have achieved?

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Funding entitlements

You will have access to the funding calculator

- Drive your own funding entitlements.
- Plan your application accordingly.

At the time of assessment we will:

- complete an assurance check of your funding assumptions.
- contact you if we need to discuss any aspects of your calculation.

We have provided the funding entitlement calculator to you so that you can be in the driver's seat while you are putting your application together.

Importantly though as the Authorisation Board must consider the Crown financial implications of any application, we will be checking the funding assumptions at assessment stage and confirming with you if we have encountered any discrepancies or variables. This will ensure they are making decisions on applications with the correct financial information and implications.

Handover to Sam who gave a demo of the calculator and explained the different components:

- Inputs
- Outputs
- Data dictionary
- Inclusions and exclusions
- Troubleshooting

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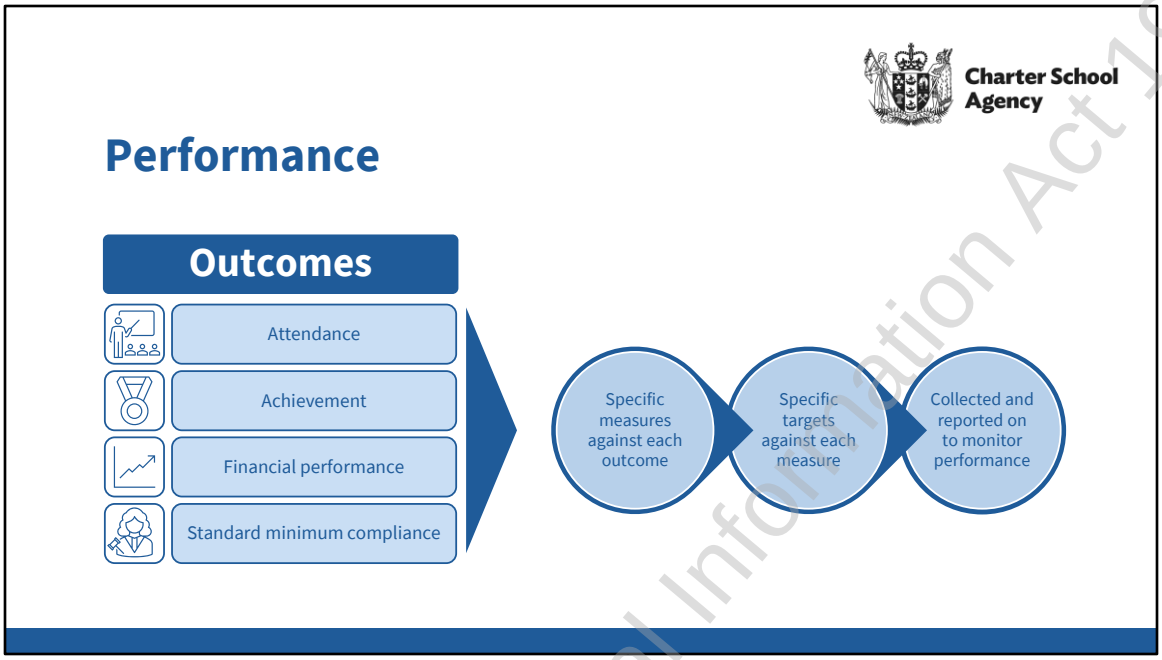

The Performance Management Framework starts with outcomes that we want to see:
To attain that outcome what are we measuring?
To be successful, what target do you need to meet?
How will you gather and report on it and how frequently?

We want to understand what your strategy is to meet the measures and targets and to identify risks and prevent them from reaching a level where serious harm may come to a student.

Those things are going to define your ongoing relationship with the Charter School Agency and your success in the model.

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We are working toward the Authorisation Board being appointed very soon and able to make decisions regarding schools by the end of October so that we can begin negotiations early November. Our application dates are set to enable this as best we can.

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Time for questions

Ask us in the chat function now.

Remember the deadline for questions closes 4 October 2024, so get your questions in before then through GETS.

Questions that were answered in the chat during the briefing will be shared along with any that we couldn't answer via GETS.

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Karakia whakamutunga

Kua hikitia te kaupapa	*We have come to an awareness*
Kua takoto te wero	*The challenge lies before us*
Me hoe tahi i runga i te whakaaro kotahi	*Let us work together as one*
Tiaki tō tāua oranga	*Stay well so that we have the ability to manage success*
Kia kaha ai mō te tuku taonga	*Behold, here is the pathway to enlightenment and well being*
Kia tutuki ngā hiahia mō Ka Hikitia	*What a positive feeling!*
Tihei mauriora!	
Ki te whai ao	
Ki te whai oranga e!	
Mauriora!	

Closing karakia by Chris Richards

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The measures and targets

This section will explain the performance expected of your school should your application be successful. It sets out the different outcomes we want to see, and how we will measure your success in achieving those outcomes.

A significant part of our selection criteria is based off this section, so please read it carefully and ask any questions if you have them.

This document **The measures and targets** is part 3 of 5 application documents. Please make sure that you read all documentation provided including the additional appendixes.

Performance management framework

Charter Schools are subject to increased oversight and accountability through the performance management framework. It will enable interventions when required while also supporting high-performing Charter Schools to grow and share good practice.

The framework will address challenges encountered in the prior model such as reducing duplication across legislation and contracts, providing clarity on the roles of the Ministry and ERO, allowing the collection of complete and sufficient data from schools; and ensuring interventions are well understood by sponsors.

Measures and targets

The framework sets out clearly defined performance outcomes, measures, and targets, as well as the tools used to track these. It will be used to hold sponsors to account and will provide Government and the community with assurance that Charter Schools are delivering quality education. The specific performance outcomes, measures and targets will be included in the sponsor's contract with the Charter School Agency**.**

Monitoring

The Charter School Agency will take primary responsibility for day-to-day monitoring of Charter Schools but will work collaboratively with the Education Review Office (ERO) to deliver an effective Monitoring Framework.

The framework will hold sponsors accountable to contracted performance outcomes. The Charter School Agency will report as required to the Authorisation Board.

The Charter School Agency's monitoring activities include:

- Review of Charter Schools annual self-audit in June of each year (required under legislation) including a set of independently audited financial accounts.
- Additional reporting milestones included in contracts, including end-of-year reporting in December against some outcome areas.
- Contracts will specify what performance information is to be provided, 4through the use of specific tools or submission of data. The performance measures and targets will be standardised across schools or a group of schools.

ERO's role is to further strengthen accountability and public transparency, and they will:

- Conduct pre-establishment checks on new charter schools and complete verification reports within the first year of establishment.
- Conduct cyclical monitoring to validate and verify the information provided by charter schools against their contracts, with a primary objective of ensuring the physical and emotional safety of children and young people is maintained. These reports will be published to ensure public transparency.

Intervention framework

The intervention framework lays out specific actions that can be used where a charter school is not meeting its contractual or legislative obligations, including performance outcomes and targets, or not providing information needed to assess performance.

The intervention framework will operate proportionally, with the objective of responding to poor performance using the most appropriate level of intervention. The Authorisation Board will consider progress over time when applying an intervention.

Interventions to be set in legislation and used by the Authorisation Board	
1	Require a sponsor to provide specific information or carry out a specific action
2	Require the Education Review Office to conduct a review of the school
3	Replacement of the sponsor
4	Termination of the contract

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Charter Schools | Kura Hourua: Performance Management Framework

Charter schools are an alternative way of delivering education to meet the needs and preferences of students. Charter schools will have greater flexibility to innovate, including in the design of a school's structure, governance, and curriculum. In exchange for greater flexibility, they are subject to increased oversight and accountability through the performance management framework.

The framework sets out clearly defined performance outcomes, measures and targets, as well as the methods used to track these. It will be used to hold sponsors to account and provide the Government and the community with assurance that charter schools are delivering quality education.

Outcomes	Measures	Standardised targets	Minimum performance threshold	Method	Reporting
Attendance	Regular attendance at school (students attending school for more than 90% of the term)	80% of learners regularly attending	EQI Group - 'Fewer' Barriers: 60% EQI Group - 'Moderate' Barriers: 50% EQI Group - 'More' Barriers: 35%	Electronic attendance register	Daily, each term and an annual self-audit in June
Achievement	**Primary: Years 3 to 10** • Reading or pānui • Writing or tuhituhi • Mathematics or pāngarau	80% of learners are at or above the expected curriculum level	**Reading** EQI Group - 'Fewer' Barriers: 70% EQI Group - 'Moderate' Barriers: 50% EQI Group - 'More' Barriers: 30% **Writing and maths** EQI Group - 'Fewer' Barriers: 35% EQI Group - 'Moderate' Barriers: 35% EQI Group - 'More' Barriers: 25%	Assessment tools such as: • e-asTTle (MoE) • Progressive Achievement Tests (PATs - NZCER) • Te Waharoa Ararau (MoE)	Annual self-audit in June and a follow-up report in December
	Secondary: Years 11 and above • Qualification attainment	95% of school leavers reach NCEA level 2 or above	EQI Group - 'Fewer' Barriers: 95% EQI Group - 'Moderate' Barriers: 80% EQI Group - 'More' Barriers: 65%	NCEA Level 2 attainment / equivalent in an approved qualification	Annual self-audit in June
Financial performance	**Financial health** Key indicators include operating surplus, working capital ratio, debt/equity ratio, operating cash, enrolment variance. **Financial probity** • Discharge of all contractual obligations before using any profit • Notification when any source of anticipated funding (on which the ongoing viability of the sponsor or school(s) is dependent) will not be available • Notification of any failure to pay debt from borrowed money; or of any expectation they will fail to pay this debt in future • Related party disclosure • Sensitive expenditure policies in place • Expected use of funds and financial plans	• Operating surplus: 2 – 5% • Working capital ratio: 2:1 • Debt/equity ratio: 0.5:1 • Operating cash: positive cashflow forecast = actual • Enrolment variance: contextual measure assessed in reports as either growing, stable, or decreasing.		Annual self-audit in June and a follow-up report in December	Annual self-audit in June and a follow-up report in December
Standard minimum compliance (SMC)	• Minimum of 75% of certificated teachers employed • Student enrolment requirements • School day, hours, and term date requirements • Reporting requirements • Record keeping and data management • Insurance • Transport provision requirements (if applicable) • Property (if applicable)	SMC measures do not require performance targets. A sponsor's failure to meet standards carries an immediate risk to students and/or school operations.		Annual self-audit including a sponsor assurance statement and a self-audit check	Annual self-audit in June

Performance monitoring

The Charter School Agency and the Education Review Office have worked closely to develop a robust monitoring approach for charter schools. The Charter Schools Agency will be responsible for day-to-day monitoring of charter schools and will report as required to the Authorisation Board.

The legislative framework for charter schools sets out that:

- Sponsors will be held accountable to performance outcomes and that they will provide information on performance outcomes
- Contracts can specify what performance information is to be provided using specific tools or submission of data
- Performance measures and targets may be standardised across schools or a group of schools
- Charter schools must complete an annual self-audit, including a set of independently audited financial accounts

Intervention framework

The Intervention Framework sets out specific actions that can be used where a charter school is not meeting its contractual or legislative obligations. The Authorisation Board will consider progress over time when applying an intervention.

Interventions set in legislation and used by the Authorisation Board:

- Require a sponsor to provide specific information or carry out a specific action
- Require the Education Review Office to conduct a review of the school
- Replacement of the sponsor
- Termination of the contract

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Charter School Funding Entitlements Calculator (2025)

Purpose

This calculator has been developed for the Charter School Agency to estimate Charter School funding entitlements for the 2025 calendar year. **It is not intended for use in determining actual payments** or providing any form of **guarantee of funding**.

Notes

Some cells in the calculator have been prepopulated with specific values due to the restrictions of the calculator. These must be replaced with the information relevant to your proposed school. The prepopulated values are not specific to your project and should be updated with your own data.

Some decisions regarding the roll basis of funding are still pending. For further details on how roll returns affect state school funding, visit the Ministry of Education website.
How operational funding is calculated – resourcing rolls – Education in New Zealand
These figures are provisional and should only be considered indicative. They do not imply any guarantee of funding. Refer to the Charter School Agency website for the latest information.
Information for sponsors and schools :: Charter Schools | Kura Hourua

Methodology / Modelling Logic

The calculator uses the most current funding formulas and rates, reflecting the latest approved updates. These rates are aligned with the most recent information available.

Guide

Worksheets Overview

The calculator consists of three main worksheets:

1. Input

This worksheet includes two sections:

School Details: Users input school details in the designated **orange cells**.
Some cells have defined parameters (e.g., EQI values within a specific range), TRUE/FALSE options, and dropdown lists.
Data Dictionary: Provides detailed explanations of all input variables.

2. Output

This worksheet also includes two sections:

Estimated Full Year Entitlement: Displays the estimated **2025 calendar year funding**, calculated based on the input variables.
Data Dictionary: Explains each sub-component of the funding model.

Note: Key details, such as the capital maintenance funding rate for schools on sponsor-owned property, will be updated in **November**.

3. Services

This worksheet contains the following table:

CASHED UP SERVICES: Includes all nationally available services that are being "cashed-up" and included in the **Services** component of the **Output** worksheet.

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School Details

This is a backwards compatible version, there are no dropdown lists or data validation rules. The User needs to ensure Inputs align precisely with allowed values in Data Dictionary

Orange Input Cells: For entering school-specific details.

	Input
School Type	Composite
New School	TRUE
Property Type	Leased from third party
Area Classification	Major urban centre
EQI	486
Vandalism Risk	Not Qualify
Inclusion in Risk Management Scheme	FALSE
Inclusion in Donations Scheme	TRUE
Isolation Index	-

School Roll By Year Level

Count of Students by Year Level

Year Level	Count
Year 1	-
Year 2	-
Year 3	-
Year 4	-
Year 5	-
Year 6	-
Year 7	-
Year 8	-
Year 9	-
Year 10	-
Year 11	-
Year 12	-
Year 13	-

Māori Language Programmes

Number of learners in Māori language Programmes by level

Level 1	-
Level 2	-
Level 3	-
Level 4	-

Pacific Language Programmes

Number of learners in Pacific language Programmes by level

Level 1	-
Level 2	-

Data Dictionary

Variable Name	Description	Data Format	Allowed Values	Notes	Relevant Ministry Links	Additional info
School Type	Type of school.	Defined options	[Primary, Secondary, Composite]	Select the appropriate type from the predefined list.Primary schools cover years 1 through 8, secondary schools encompass years 9 through 13, and composite schools include years 1 through 13.	https://parents.education.govt.nz/primary-school/schooling-in-nz/different-types-of-primary-and-intermediate-schools/	https://www.legislation.govt.nz/bill/government/2024/0066/latest/LMS965363.html?search=sw_096be8ed81e5a7f4_primary_25_se&p=1&sr=0
New School	Indicates whether the school is newly established.	True/False	TRUE or FALSE	Set to True if the school is a new school; otherwise, set to False.		
Property Type	Type of property ownership.	Defined options	[Ministry owned, Sponsor owned, Leased from third party]	Choose the property type from the list of predefined options.		
Area Classification	Classification of the area where the school is located.	Defined options	[Major urban centre, Other areas]			
EQI	Equity Index of the school.	Integer	Positive integers between 344 and 569 (e.g., 344,345,346, ...)	Enter the Equity Index as a positive integer. The 2024 average is EQI is 461.	https://www.education.govt.nz/our-work/changes-in-education/equity-index/	
Vandalism Risk	Indicates if the school is at risk of vandalism.	Defined options	[Low Risk, Medium Risk, High Risk, Critical Risk, Extreme Risk, Not Qualify]	Ministry will provide schools vandalism risk rating	https://www.education.govt.nz/school/funding-and-financials/resourcing/operational-funding/operational-funding-components/#Vandalism	
Inclusion in Risk Management Scheme	Indicates if the school is included in the Risk Management Scheme.	True/False	TRUE or FALSE	Set to True if the school is included in the Risk Management Scheme.	https://www.education.govt.nz/school/funding-and-financials/resourcing/operational-funding/the-risk-management-scheme-contents-and-liability-insurance/	
Inclusion in Donations Scheme	Indicates if the school is included in the Donations Scheme.	True/False	TRUE or FALSE	Set to True if the school is included in the Donations Scheme. EQI has to be higher than 431 to be eligible for the scheme.	https://www.education.govt.nz/school/funding-and-financials/fees-charges-and-donations/	
Isolation Index	Isolation Index of the school.	Integer	Positive Number between 0 and 23 (e.g., 0, 0.1,0.2 ...)	Enter the Isolation Index as a positive Number. The average Isolation index in 2024 is 0.79.	https://www.education.govt.nz/our-work/changes-in-education/equity-index/faq-isolation-index-changes/	
School Roll By Year Level	Number of students enrolled in the school by year level.	Integer	Positive integers (e.g., 0, 1, 2, ...)	Enter the total number of students by each year level.	https://www.education.govt.nz/our-work/our-role-and-our-people/education-in-nz/#:~:text=The%20education%20system%20for%20schools,%E2%80%9317%20years%20of%20age).	
Māori Language Programmes	Count of students in Māori Language Programmes by immersion level.	Integer	Positive integers (e.g., 0, 1, 2, ...)	Enter the count of students enrolled in Māori Language Programmes by level.	https://www.education.govt.nz/school/funding-and-financials/resourcing/operational-funding/operational-funding-components/#Maori	
Pacific Language Programmes	Count of students in Pacific Language Programmes by immersion level.	Integer	Positive integers (e.g., 0, 1, 2, ...)	Enter the count of students enrolled in Pacific Language Programmes by level.	https://www.education.govt.nz/school/funding-and-financials/resourcing/operational-funding/operational-funding-components/#Pacificbilingual	

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Estimated Full Year Entitlement

2025 Calendar year (inclusive of Entitlement funding where applicable)
Figures are provisional and subject to change

Salaries		
First students	$	-
Extra Students	$	-
Māori Immersion	$	-
Pacific Immersion	$	-
Total	$	-

Operations		
Base Funding	$	-
Relief Teacher funding	$	-
Heat Light and Water funding	$	-
Equity Funding (EQI)	$	-
Support for Inclusion (SIF) previously SEG	$	-
Careers Information Grant (CIG)	$	-
ICT Funding	$	-
Targeted Funding for Isolation	$	-
Per-Pupil Funding	$	-
KiwiSport	$	-
Maori Language Programme	$	-
Donations Scheme	$	-
Pacific Bilingual and Immersion Funding	$	-
STAR Funding	$	-
Risk Management Scheme Premium	$	-
Vandalism	$	-
Non-teacher top-up funding	$	-
Total	$	-

Services		
Payroll	$	-
Professional Learning and Development (PLD)	$	-
Digital	$	-
Total	$	-

Establishment		
Operational Funding	$	-
Senior Management Funding	$	30,553.93
Funding for Remaining Staff	$	-
Initial furniture and equipment funding	$	-
Initial Fit-out	$	-
Information Technology	$	-
Total	$	30,553.93

Property		
Property Maintenance	$	-
Furniture and Equipment	$	-
Capital Maintenance and leased-based funding*	$	-
Total	$	-

** For schools on Ministry-owned property, a minimum of 70% must be spent on capital maintenance*

Total Entitlement	**$**	**30,553.93**

Data Dictionary

Component	Sub-Component	Description	Notes	Further Information
Salaries	**First students**	Salaries Funding for the first 100 Primary students or first 200 for Secondary/Composite.	Staffing-based funding is provided as a per-student cash rate, calculated based on the estimated staffing entitlement for similar State schools, varying by school type. Under the agreed funding model, charter schools receive higher rates for the first 100 students in primary schools and the first 200 students in secondary and composite schools, reflecting the "base staffing." For any additional (extra) students—those beyond 100 in primary schools or beyond 200 in secondary and composite schools—a lower rate is applied.	https://www.charterschools.govt.nz/assets/Uploads/20240812-CSA-funding-factsheet.pdf
Salaries	**Extra Students**	Salaries Funding for additional students above the first 100 (Primary) or 200 (Secondary and Composite).	Staffing-based funding is provided as a per-student cash rate, calculated based on the estimated staffing entitlement for similar State schools, varying by school type. Under the agreed funding model, charter schools receive higher rates for the first 100 students in primary schools and the first 200 students in secondary and composite schools, reflecting the "base staffing." For any additional (extra) students—those beyond 100 in primary schools or beyond 200 in secondary and composite schools—a lower rate is applied.	https://www.charterschools.govt.nz/assets/Uploads/20240812-CSA-funding-factsheet.pdf
Salaries	**Māori Immersion**	Salaries Funding for Māori Immersion.	To reflect the additional resourcing state schools receive, a model was used to determine the per-pupil rate for the equivalent cashed-up funding. Note that this is based on the number of Māori immersion students.	https://www.charterschools.govt.nz/assets/Uploads/20240812-CSA-funding-factsheet.pdf
Salaries	**Pacific Immersion**	Salaries Funding for Pacific Immersion.	To reflect the additional resourcing state schools receive, a model was used to determine the per-pupil rate for the equivalent cashed-up funding. Note that this is based on the number of Pacific immersion students.	https://www.charterschools.govt.nz/assets/Uploads/20240812-CSA-funding-factsheet.pdf
Operations	**Base Funding**	Base funding to assist with the fixed costs associated with the operation of a school.	To reflect the additional resourcing state schools receive, a model was used to determine the per-pupil rate for the equivalent cashed-up funding.	https://www.education.govt.nz/school/funding-and-financials/resourcing/operational-funding/operational-funding-components/
Operations	**Relief Teacher funding**	Funding to help with the payment of salaries and allowances for relief teachers.	For state schools, this is generated based on the number of teaching positions eligible for relief teacher funding. A model was used to determine the per-pupil rate for relief teacher funding.	https://www.education.govt.nz/school/funding-and-financials/resourcing/operational-funding/operational-funding-components/#Relief
Operations	**Heat Light and Water funding**	Funding to support with the costs of power, fuel and water.	Operational funding for heat, light and water is for: electricity (supply, capacity and line charges) energy costs for sewage schemes and water supply (self-supply schools) gas, reticulated and portable, including delivery and canister hire coal and wood, including delivery costs water supply rates. A model was used to determine the per-pupil rate for Heat, Light and Water funding.	https://www.education.govt.nz/school/funding-and-financials/resourcing/operational-funding/operational-funding-components/#Heat
Operations	**Equity Funding (EQI)**	Funding aimed at supporting schools which face socio-economic barriers that impact student achievement.	We provide schools and kura with equity funding, in addition to their core funding, so they can work in different ways to reduce the impact socio-economic factors have on student achievement.	https://www.education.govt.nz/our-work/changes-in-education/equity-index/how-the-equity-index-applies-to-funding/
Operations	**Support for Inclusion (SIF) previously SEG**	Funding to schools to support students with moderate education needs.	Support for inclusion funding, which was previously called the special education grant, helps you to support students with moderate special education needs, such as learning and behaviour difficulties.	https://www.education.govt.nz/school/funding-and-financials/resourcing/operational-funding/operational-funding-components/#inclusion
Operations	**Careers Information Grant (CIG)**	Funding to support year 9+ students.	The careers information grant assists with the provision of careers information and guidance for schools with Year 9 to 13+ students.	https://www.education.govt.nz/school/funding-and-financials/resourcing/operational-funding/operational-funding-components/#Careers
Operations	**ICT Funding**	ICT funding to support hard/software.	Information and communication technology (ICT) funding to help schools buy hardware and software.	https://www.education.govt.nz/school/funding-and-financials/resourcing/operational-funding/operational-funding-components/#ICT
Operations	**Targeted Funding for Isolation**	Support for costs assocaited with isolation.	If your school is in an isolated area, you may be eligible for additional operational funding called 'targeted funding for isolation'. This funding helps schools whose isolation means that they have additional costs associated with accessing goods and services needed to operate their school and deliver the curriculum. A new Isolation Index was implemented in January 2023.	https://www.education.govt.nz/school/funding-and-financials/resourcing/operational-funding/operational-funding-components/#Isolation
Operations	**Per-Pupil Funding**	Operations funding based on year levels of students.	We set 4 levels of per-pupil funding to recognise the cost of curriculum delivery at each level. We calculate per-pupil funding using the number of students on a school's roll. Per-pupil rates are universal and apply to all schools.	https://www.education.govt.nz/school/funding-and-financials/resourcing/operational-funding/operational-funding-components/#Perpupil
Operations	**KiwiSport**	Funding to support and promote sports.	KiwiSport is a Government funding initiative that promotes sport and aims to increase opportunities for school-aged students to participate in organised sport. KiwiSport provides funding for schools with Year 1 to 8 and Year 9 to 13 students.	https://www.education.govt.nz/school/funding-and-financials/resourcing/operational-funding/operational-funding-components/#Kiwisport
Operations	**Māori Language Programme**	This funding is for students enrolled in Māori language programmes that meet all the criteria for 1 of 4 immersion levels.	Although Māori language programmes have 6 levels that may be reported in your roll returns, only students enrolled in Levels 1 to 4 (including 4a and 4b) generate funding. Visit our operational funding rates page for Māori language programme funding rates.	https://www.education.govt.nz/school/funding-and-financials/resourcing/operational-funding/operational-funding-components/#Maori
Operations	**Donations Scheme**	Funding to schools that opt into the scheme (that choose not to receive donations).	schools with an EQI of 432 or higher can choose to receive a per-student payment per year if they agree not to ask parents and caregivers for donations (except for overnight camps).	https://www.education.govt.nz/school/funding-and-financials/fees-charges-and-donations/
Operations	**Pacific Bilingual and Immersion Funding**	This funding is for students enrolled in Pacific language programmes that meet all the criteria for Level 1 or Level 2 immersion levels.	Although Pacific language programmes have 4 levels that may be reported in your roll returns, only students enrolled in Levels 1 or 2 generate funding. Visit our operational funding rates page for Pacific bilingual and immersion programme funding rates.	https://www.education.govt.nz/school/funding-and-financials/resourcing/operational-funding/operational-funding-components/#Pacificbilingual
Operations	**STAR Funding**	Secondary-tertiary alignment resource (STAR) funding. Used to support year 11-13 students through accessing courses and career-related experiences.	Note: this is based on the existing 2024 rate. The 2025 rate will be published later in the year. STAR funding is a capped resource available to schools with Year 11 to 13+ students. STAR funding is based on STAR funding units, which we allocate to eligible schools. Our initial STAR funding estimate uses your school's provisional resourcing roll, (excluding adult students) for Years 11, 12 and 13+. We calculate STAR funding units quarterly according to our quarterly roll count policy. Each Year 11, 12 and 13+ student generates one STAR unit. Teen parent units will be weighted at 1.5 units per student. If your school has less than 30 units, then we allocate your STAR funding at the rate per unit listed in the operational funding rates. If your school has more than 30 units, we allocate your first 30 units using the base rate and the remainder using the additional STAR funding unit rate.	https://www.education.govt.nz/school/funding-and-financials/resourcing/operational-funding/operational-funding-components/#star
Operations	**Risk Management Scheme Premium**	Risk management scheme that schools can pay to join.	Our risk management scheme is a non-profit scheme that offers comprehensive contents, liability and cyber insurance for your school. Your school can choose to insure with a private insurance company or join this scheme. All school assets, other than land and buildings owned by the Crown, must be insured.	https://www.education.govt.nz/school/funding-and-financials/resourcing/operational-funding/the-risk-management-scheme-contents-and-liability-insurance/
Operations	**Vandalism**	Funding included each year in your operational funding to repair damage caused by vandalism.	The amount paid to your school is calculated in categories based on the number of pupils and the risk of vandalism in your area (determined by previous vandalism costs).	https://www.education.govt.nz/school/funding-and-financials/funding/vandalism-funding/
Operations	**Non-teacher top-up funding**	Schools are funded additional increases to their operational grants to meet the cost of non-teaching staff pay increases.	The equivalent per-pupil funding rate was modelled based on actual funding to State schools.	https://www.education.govt.nz/school/funding-and-financials/resourcing/non-teaching-staff-settlements-and-funding/

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Services	**Payroll**	Cashed-up equivalent to payroll services that are received by state schools.	Per-student funding rate based on cost of services for State schools.	https://www.charterschools.govt.nz/assets/Uploads/20240812-CSA-funding-factsheet.pdf
Services	**Professional Learning and Development (PLD)**	Cashed-up equivalent for nationally provided PLD opportunities provided for improved quality teaching and learning, support and resources for teachers, curriculum support and professional development and support.	Per-student funding rate based on cost of services for State schools.	https://www.charterschools.govt.nz/assets/Uploads/20240812-CSA-funding-factsheet.pdf
Services	**Digital**	Cashed-up equivalent to digital software, network infrastructure, support systems, digital content and resources, cyber security measures and infrastructure management tools.	Per-student funding rate based on cost of services for State schools.	https://www.charterschools.govt.nz/assets/Uploads/20240812-CSA-funding-factsheet.pdf
Establishment	**Operational Funding**	Broadly equivalent per-pupil funding with State Schools. Covers the three parts of the operational component for establishment funding: Administration grant, Library/Resource Centre grant and Learning and Teaching grant.	The base and per-pupil funidng components of the Operational component of establishment grants has been converted into per-pupil rates.	
Establishment	**Senior Management Funding**	Funding is provided for senior staff broadly equivalent to what is funded for state schools for 2024 Q3.	Establishment staffing allows for roles to be employed prior to the scshool starting in order to prepare for opening. Funding is cashed-up for broadly equivalent roles that are funded at State schools. The roles cashed-up include; Principal, Senior Management and Senior heads of Department (only applicable for secondary and composite schools).	
Establishment	**Funding for Remaining Staff**	For Q4 2024: staffing broadly equivalent to what a State schools would receive is cashed-up, this includes both senior staffing and regular teachers.	State schools are entitled to teaching staff for the quarter prior to opening. Broadly equivalent entitlement has been cashed-up to allow Charter schools equivalent entitlement.	
Establishment	**Initial furniture and equipment funding**	Funding to fit-out new schools with furniture and equipment.	New State schools receive initial furniture and equipment funding based on the net areas of their "standard" and "specialised" spaces. Estimates were made of the space make-up of new charter schools, and a model was fit to calculate broadly equivalent funding.	
Establishment	**Initial Fit-out**	Funding to meet general fit-out costs for new schools.	For 2025 the rates for fitout are set at half the annual notional lease-based funding rates, with respect to schools in a "General" area (ie not a major urban area) in the school year before the school opens. This is broadly equivalent to the fit-out funding for a new state (non-integrated) school. The rates would apply to any new charter school.	
Establishment	**Information Technology**	Funding for new Information Technology.	New state schools receive establishment ICT funding to purchase ICT equipment such as servers, wireless access points, printers, and monitors. As in state schools, this funding would be provided to charter schools at a flat per-student rate, not a stepped rate.	
Property	**Property Maintenance**	Funding to pay for maintenance of property. Funding doesn't cover capital work or operational non-property expenses.	A model was fit based on actual funding of State schools, giving rates for the different school types and first and additional students.	https://www.education.govt.nz/school/funding-and-financials/funding/property-maintenance-grant/#:~:text=The%20property%20maintenance%20grant%20is,along%20with%20your%20operational%20funding.
Property	**Furniture and Equipment**	Funding for the renewal of furniture and equipment.	Funding has been determined as a percentage of Year 1 capital maintenance funding (20% of full capital maintenance funding for a charter school on Ministry property).	https://www.education.govt.nz/school/funding-and-financials/funding/furniture-and-equipment-funding-for-schools/
Property	**Capital Maintenance and leased-based funding**	Funding for capital maintenance for schools on Ministry or sponsor-owned property or lease-based funding for schools on property leased from a landlord.	Capital maintenance and Lease-based funding is determined by the Property Type of the school, whether the property is Ministry owned, sponsor owned or leased from a landlord. Capital maintenance funding to school on Ministry property were modeled on existing capital maintenance funding to state schools. Capital maintenance funding to schools on sponsor owned property has been set to the existing per student rate as to the proprietors of state integrated schools (note the 2025 rate will be published at the end of November, so the 2024 rate is currently used). For schools on leased property, the rate was modeled on the notional lease of state school properties against their school rolls.	https://www.education.govt.nz/school/funding-and-financials/funding/capital-funding-for-integrated-schools/#:~:text=Paying%20for%20capital%20work%20at,capital%20maintenance%20and%20modernisation%20projects.

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CASHED UP SERVICES

Service / programme	Current Description	Grouping
Payroll services	All inclusive cost for Payroll services including technology maintenance and improvements. It does not include Ministry-run remediation programme which is not a service provided to schools.	Payroll
Principals Development and support - online modules	This service provides online modules for aspiring and beginning principals to learn about core functions, skills, and knowledge requried to be an effective principal	Professional Learning and Development
Provisionally Certificated and Overseas Trained Teachers Support (PRT/OTT) - CORE	The PCC OTT support for mentor contract aims to provide participants with the appropriate supports to assist with gaining full certification and making a successful start to their teaching career in New Zealand	Professional Learning and Development
Provisionally Certificated and Overseas Trained Teachers Support (PRT/OTT) - Otago uni	The PCT OTT suport for mentor contract aims to provide participants with the appropriate supports to assist with gaining full certification and making a successful start to their teaching career in New Zealand	Professional Learning and Development
PLD (General) Manaiakalani Education Trust Outreach programme	A PLD Support that is delivered in person and online. It is aligned to the curriculum change programme through the Programme's Reading Intensive Practice, and Digital Fluency Intensive components and a maths intensive practice pilot that will be fully implemented from 2024	Professional Learning and Development
Principals Development and support - Leadership Advisors Beginning Principals - Evaluation Associates	Provides guidance and targeted support to principals in the first 2-3 years of their time in the role	Professional Learning and Development
Principals Development and support - guided and targeted supports	For aspiring and beginning principals to learn about core functions, skills and knowledge required to be an effective principal	Professional Learning and Development
Licensing agreement (Google)	Provide schools with software licences	Digital
Licensing agreement (Microsoft)	Provide schools with software licences that include the Microsoft 365, windows operating system and minecraft	Digital
Laptops for teachers and principals (TELA)	TELA+ is a digital device leasing scheme for eligible teaching staff in state and state-integrated schools	Digital
N4L (Managed Network for schools)	N4L encourages all schools and kura with a N4L Managed Network connection to use our safe and secure internet service with our recommended settings to provide students with a baseline level of protection while learning online at school.	Digital

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Notifications for Applicants

Notification No. 2.0 | **Date:** 27 September 2024

Updates to Notification for Applicants 01:

Topic	Answer
Draft contract	With the Authorisation Board being announced today, it is prudent to ensure they are informed of the detail of the draft contract with sponsors and endorse it as an accurate reflection of their expectations. This does mean however, given the timeframe for the Board to review documents and make their approvals, that the Charter School Agency will share the contract with only those applicants that are approved by the Authorisation Board. This is expected to happen the week beginning 21 October 2024. We understand this is much later in the process than you originally expected, however it is important to allow the Authorisation Board to make sure the contract meets everyone's expectations. We'll still look to provide you with some guiding information on our approach to contracting and will of course allow an appropriate amount of time for

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	successful sponsors and their legal support to review the contract once it is made available.
Revised answer Just to clarify, the ear-marked categories e.g. kiwi sport are just to go into the overall fund and there is flexibility with how that money is spent?	In our earlier notification to you, we advised that this would be operational funding cashed up with autonomy for the sponsor on how this is spent, but we've included further detail below: • Cashed up funding is calculated to achieve broad equivalence with the resourcing for state schools of a similar roll and type. The components that the calculations are based on (as set out in the funding calculator) have been used to approximate the value of equivalent resourcing for state schools. This value is then converted to a per-child rate, and the amount a school receives will be driven by roll returns on certain dates throughout the year. • Spend is not tied to those components – sponsors will have autonomy over how their funding is spent. This funding should be applied in the best way possible to achieve the contracted outcomes. • The exception to this is for schools that occupy Ministry-owned property: at least 70% of the capital maintenance funding entitlement must be spent on projects that create Crown assets. The exact amount will be agreed through the negotiation process.
Updated documents For the Performance Management Framework (PMF) – I can't access the links from the prior notification?	The performance management framework including the targets can be found on our website: A3 - Performance Management Framework

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Questions received from applicants:

Question Topic	Answer
I noticed that in the other documentation they mentioned PAT testing from year 3 onwards...what about below year 3?	There are no charter school standardised targets or performance thresholds for below Year 3, as the required primary assessment tools do not test below Year 3. PATs only cover assessments from Year 3 – Year 10. You can find out more about PAT tests here: Understanding PATs - for parents and the community | New Zealand Council for Educational Research
Are the assessment tools mentioned in the documentation compulsory? Or is there flexibility with assessment tools?	Sponsors will be required to report on student achievement and progress in Years 3 – 10 using either: • The Ministry of Education e-asTTle tool. • New Zealand Council for Educational Research PATs. • The Ministry of Education Te Waharoa Ararau tool. In Years 11 – 13, sponsors will be required to report on student achievement and progress using NCEA Level 2 attainment or equivalent in an approved qualification.
The documentation also mentioned that a school "of special character" can decline an enrolment only if the parents do not agree to the special character. Can you please clarify this?	Yes. There is a new section 212T(2) of the Bill which allows a charter school with a character approved by the Authorisation Board to deny enrolment if a parent, or other person with responsibility of the education of the student, refuses to accept that the school operates with that character.

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	This “character” is referring to “any religious, philosophical, or other distinguishing characteristics of the school” as notified in the Gazette when it is established (see new section 212M(2)(e)). This is regardless of whether there is an oversubscription. This is similar to the provisions for designated character schools (see section 204(5)), State integrated schools (see clauses 26, 27 of Schedule 6) and Kura Kaupapa Māori (see section 201(9)).
With regards to structure can you clarify if the sponsor and school can be separate legal entities?	The school itself is not a legal entity, it exists only by virtue of the contract. As per the legislation, the definition of a sponsor means the governing body of a charter school that the Authorisation Board has approved under new section 212I to operate the school. A sponsor must be a body corporate, corporation sole, limited partnership, institution, or related entity.
I see that the targets have been set, page 3 of the performance measures document. Due to a high percentage of Neurodivergent students can targets be set on an individual basis, not a school-wide basis?	No, the standardised performance target is a target we expect each charter school to work towards. The minimum performance thresholds will be adjusted for the socio-economic barriers faced by students, measured by the Equity Index. The standardised target, and the minimum performance threshold, create a ‘zone’ in which we expect schools with similar circumstances to be performing. While there is no further flexibility on the level on which the performance targets and the minimum thresholds are placed, the Authorisation Board will consider progress towards achieving the targets when assessing performance.
Do we know whether there will be an external auditing process?	Financial statements provided annually by the sponsor to the Charter School Agency must be audited by a qualified auditor (within the meaning of section 35 of the Financial Reporting Act 2013). In addition, the Authorisation Board is able to – as part of an intervention

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	– require a sponsor (or other person authorised by the Authorisation Board) to provide specific information and/or an analysis of that information. This may include requiring an external audit.
I understand that ORS funding is not captured here. But I am talking about students that have e.g. specific learning differences and / or neurodiverse needs but are NOT covered by ORS funding. E.g. can I reflect higher student needs via an imputed EQI value?	No. Once a charter school is contracted, and Equity Index (EQI) value will be determined using a formula based on individual student variables drawn from administrative datasets. EQI values are not based on information provided by the school. The cashed-up funding model does not include targeted funding for specific student needs. Charter schools will, however, have access to the same learning support as State schools but will need to apply and meet the same eligibility criteria as State schools.
We have our annual financial statements prepared by an accounting firm every year, as a small charity. Moving forward, will we need more specialised/school-savvy accounting or will this be somehow managed through the Ministry, or should we continue with our accounting firm? We did not see provision for expenses relating to accounting (other than payroll) in the spreadsheet.	This is a business decision for sponsors.
The establishment section of the calculator appears to be for schools who are new and not yet established, needing a full fit out, etc. Could you clarify if existing schools (converting from state, setting up a new independent school with existing assets) will be eligible for any of this establishment funding to be able to convert our school, establish new classroom spaces and new library areas, etc please?	Converting schools are not eligible for establishment funding. However, there is provision for them to be compensated for reasonable related expenses. This will be agreed through the negotiation process. We expect decisions soon around whether existing independent / private schools that wish to become charter schools will be eligible for establishment funding and will provide an update as soon as possible.
Will we be eligible for ORS funding, as there is a chance that we will have students who may need extra support?	Yes. Charter schools will be able to access the same targeted funding for specific student needs that is provided to State schools. This includes ORS funding.

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	Charter schools will need to apply and meet the same eligibility criteria as State schools.
I would like to understand with regard to the EQI minimum performance threshold what that means in relation to the table on measures and EQI index and translate that into a target that matches what we have set. Under the heading Minimum Performance Threshold, can you explain more about the 'fewer, moderate and more' barriers under EQI group? Is this related to social-economic barriers or education barriers such as learning disabilities/differences or both? From what I can read about the EQ index on the MOE website 'barriers' seems to be in reference to funding based on social/economic.	EQI specifically relates to socio-economic barriers. The minimum performance threshold groups (Fewer barriers, Moderate barriers, or More barriers) have been developed using analysis of existing achievement data and factors that reflect a charter school's characteristics, particularly socio-economic disadvantage. The minimum performance thresholds were agreed as they consider the different starting points and circumstances for individual students and schools. They provide a balance between high standardised targets and the factors impacting a student's achievement in the lower EQI Bands.
In previous Q&A sessions the question was asked about whether the 35:15 ratio was fixed. The response was that it was a political position and open to change. The recent briefing made it sound more fixed. What is the actual situation?	The ratio is a government policy decision that current planning and assumptions are based on. The exact split will be determined by the Authorisation Board and will be informed by the considerations they have to make under the legislation, such as network and funding implications.
Why in the recent meeting were mics and cameras muted?	Disabling participants' cameras and microphones is a standard approach when delivering webinars. We adopted this approach to ensure an efficient briefing and deliver complex information such as the funding calculator. Participants had the opportunity to ask questions via the chat, and we answered these during the webinar. Any questions that were not answered will be posted on GETS when we have a response.
Will you be holding open Q&A sessions in stage two? Please let us know so we can plan for them.	We are not intending to hold the same kind of drop in Q&A sessions as we did in stage one. You are welcome to ask questions through GETS or send us an email at applications@charterschools.govt.nz. All questions and answers through both channels will be recorded and posted on GETS. The focus of

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	applicants for this stage differs and we are responding queries from specific applicants directly. The support partners are also now available to address questions as they work alongside applicants.
How are you ensuring that the role of the Authorisation Board is not minimised? If they are not going to conduct a full range of interviews, how will they be judging the personal qualities and capabilities of the applications?	The Authorisation Board has now been announced and will take office once the legislation is enacted – expected to be week beginning 30 September. In late October, the Board will make decisions on which applications are approved to begin contract negotiations with the Charter School Agency. The Board will make decisions based on the applications submitted through this application process and may want to undertake its own engagement. It is an independent board to the Charter School Agency, and it will undertake its own decision-making process.
Are charter schools eligible to join the 'whole-of-Government procurement scheme'?	No. Charter schools are independent entities and as such Public Sector eligibility does not apply to Charter Schools. The New Zealand Government Procurement Branch at the Ministry of Business, Innovation and Employment has indicated that the criteria for eligibility for All of Government contracts is: • the agency is part of the NZ public sector; • the agency is 100% owned by central or local government; • the agency has a governing body, and its composition is 100% controlled by central or local government; • the agency consolidates its financial information with central or local government, as a 'controlled entity' with no 'minority interest'.
What is the expectation regarding salary levels for charter schools and how does this relate to the salaries for state schools?	**Staff that are transferring from a converting school** Staff employed at converting schools will be transferred on "terms and conditions which are no less favourable overall". This includes provisions

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	regarding their salary. The sponsor has the option to vary the terms and conditions of converting staff by agreement after the transfer to terms and conditions which are no less favourable overall. **Staff that are newly employed** Sponsors will negotiate terms and conditions of employment with new staff (whether at new or converting charter schools). There is no expectation from the Ministry or Agency regarding the salary. This is a matter to be determined between the sponsor and new employee.
How is the ministry supporting Charter Schools so they can support neurodivergent students who need a lower student-to-staff ratio to succeed in meeting the ministry's set targets? The funding model that has been shared seems to not allow for small class sizes. What additional funds are available to assist neurodivergent students in meeting the targets?	Sponsors have the autonomy to determine how they best spend the funding they receive, to achieve the contracted outcomes. The cashed-up funding does not include targeted funding for specific student needs. However, Charter schools will have access to the same targeted funding for specific student needs as State schools but will need to apply and meet the same eligibility criteria as State schools.
The funding calculator generates an output which we will use as an input to our budget. Does the funding received from the Charter School Agency include GST, have GST added at a later date or is it zero rated?	Calculations are GST exclusive. GST will be added before the final payment.
Is there a property planning consultant available to help us? Particularly to discuss the nature and intensity of the school activity and the breadth of supporting information that may be needed to support the application for resource consent. We have been told by Auckland Council we need to engage with a planning consultant. Is there someone at the charter schools agency who can help us with this aspect? Since the support partners do not cover this area? If not, is there funding available now at all to engage in this process with a local planner sooner rather than later?	Sponsors are responsible for this activity as part of their application. There is no funding available for this purpose.
Can you explain how the percentages for 'fewer' barriers were set? 35% for fewer and moderate seems low in writing and math's compared to	The minimum performance threshold groups (Fewer barriers, Moderate barriers, or More barriers) have been developed using analysis of existing

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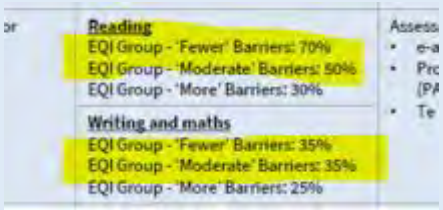
70% for reading.  	achievement data and factors that reflect a charter school's characteristics, particularly socio-economic disadvantage. The minimum performance thresholds were agreed as they consider the different starting points and circumstances for individual students and schools. They provide a balance between high standardised targets and the factors impacting a student's achievement in the lower EQI Bands.
In the calculator, in the auto populate for Establishment and the Property sections, the numbers generated seem significantly higher than indications given in the funding factsheet for part one of the application. My question would be clarifying that the auto-populate calculations are a correct indication of funding as budgets will reflect this?	The auto-populate calculations are a more robust indication of funding. The Funding fact sheet was developed based on policy decisions that had been made at that time. There have been a number of decisions about policy and funding rates since the Funding fact sheet was developed. We will update our funding guidance on the website to reflect these decisions shortly.
When will the draft contract be available for our legal team to review?	With the Authorisation Board being announced today, it is prudent to ensure they are informed of the detail of the draft contract with sponsors and endorse it as an accurate reflection of their expectations. This does mean however, given the timeframe for the Board to review documents and make their approvals, that the Charter School Agency will share the contract with only those applicants that are approved by the Authorisation Board. This is expected to happen the week beginning 21 October 2024. We understand this is much later in the process than you originally expected, however it is important to allow the Authorisation Board to make sure the contract meets everyone's expectations. We'll still look to provide you with some guiding information on our approach to contracting and will of course allow an appropriate amount of time for successful sponsors and their legal support to review the contract once it is made available.

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Notifications for Applicants

Notification No. 3.0 | **Date:** 3 October 2024

Information for applicants:

Topic	Answer
Funding calculator	Following some feedback about using the funding calculator, we are providing additional guidance to help you calculate your funding entitlement.
How do I calculate my entitlement?	1. Your funding for your first year is based on your **Establishment Roll.** This is a realistic, evidence-based forecast of your roll as it would be in Term 5 (this would be Term 1 of your **second year** of operation). 2. For example, if you open in Term 1 2025, your Establishment Roll is the prediction of your roll in Term 1 2026. 3. This number will be agreed in your sponsor contract. 4. This number is not the same as your Year 1 one roll which is the actual number of students you have stated you will have for Term 1 2025. 5. A lot of components are funded based on your T5 roll but there are some which are based on your Year 1 roll.

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<table>
<tr><td></td><td>Please see the below table to show which roll should be used for each funding component:
<table>
<tr><th>Roll Driver</th><th>Funding Component</th><th>Description</th></tr>
<tr><td>Establishment (T5)</td><td>Salaries</td><td rowspan="3">These components of funding have guaranteed minimum entitlements for new schools based on the establishment roll.</td></tr>
<tr><td>Establishment (T5)</td><td>Property</td></tr>
<tr><td>Establishment (T5)</td><td>Establishment</td></tr>
<tr><td>Year 1</td><td>Operations</td><td rowspan="2">These components are based on actual roll numbers and so your Year 1 roll number is appropriate. Using the T5 roll on these components will create an inflated budget.</td></tr>
<tr><td>Year 1</td><td>Services</td></tr>
</table></td></tr>
<tr><td>How do I calculate my full entitlement?</td><td>1. Unfortunately, the calculator only allows for a single roll input so you will need to enter your funding in separately for the components that use your establishment roll and the components that use your year 1 roll.
2. However, you can use the funding calculator for the following years (2, 3, 4 etc) using your projected rolls for those years, noting that funding will be based on actual roll numbers for these years.</td></tr>
<tr><td>What is not included in the calculator?</td><td>New schools operating on sponsor-owned or leased property
1. Sponsors will receive additional Establishment funding for capital maintenance and lease-based costs.
2. This is not included in the calculator, but you will be eligible for funding for up to six months prior to opening, starting from the contract commencement date.</td></tr>
</table>

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	3. Since contracts are expected to be signed in early November, you can estimate this amount by multiplying the estimated 2025 capital maintenance and lease-based funding by 1/6. **Capital Maintenance (for schools on Ministry-owned property)** 1. While the calculator indicates that 70% of funding must be spent on capital maintenance, this 70% will be managed by the Ministry's Property Management team. 2. As it is being managed separately, this will not be provided as cashed-up funding.

Questions from applicants:

Question Topic	Answer
Our research has led us to believe that state schools are given an Equity Funding Index. We do not have this number; how do we go about finding out what our EQI should be please? It makes a large difference in the amount of funding received.	EQI numbers for new schools will be assigned once the schools have been approved. For the purposes of using the funding calculator, you will need to make an estimate of your EQI number based on the size and make-up of similar schools in your location. You'll need to consider the socio-economic backgrounds of students and refer to this chart and this list of EQI numbers for existing schools Schooling Equity Index | Education Counts to help make your assessment. Your support partner should be able to help. Once a sponsor has been approved to open a charter school, the process for assigning an EQI will be the same as that for State schools: The Ministry of Education will assign an initial EQI number, and Year 1 payments will be made using this number. The EQI number will then be refined annually based on updated information as more details about the characteristics of the students at the school become available. Existing state schools that convert to charter school status should use their 2025 EQI as provided with their 2025 Provisional roll.

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Could you please direct me where to find our schools' EQI value.	EQI numbers for new schools will be assigned once the schools have been approved. For the purposes of using the funding calculator, you will need to make an estimate of your EQI number based on the size and make-up of similar schools in your location. You'll need to consider the socio-economic backgrounds of students and refer to this chart and this list of EQI numbers for existing schools Schooling Equity Index | Education Counts to help make your assessment. Your support partner should be able to help. Once a sponsor has been approved to open a charter school, the process for assigning an EQI will be the same as that for State schools: The Ministry of Education will assign an initial EQI number, and Year 1 payments will be made using this number. The EQI number will then be refined annually based on updated information as more details about the characteristics of the students at the school become available. Existing State schools that convert to charter school status should use their 2025 EQI as provided with their 2025 Provisional roll.
95% of school leavers reach NCEA Level 2 or above: How exactly is 'school leaver' defined? Is a year 11 student whose family moves to Australia in April counted as a 'school leaver' for this definition?	Yes, a student would be defined a 'school leaver' if they have permanently left school from 1 March for the given year to the last day of February the following year (inclusive) and, • met the age criteria • gone overseas permanently. You can find further information and definitions for school leavers here.
Is the funding GST inclusive or GST exclusive? Which years do the 3 years budget refer to? We can complete the P and L for 2025 as we have the estimated full year entitlement. Funding for 2026 is unknown as yet so shall we just complete the Estimated Full Year	Calculations are GST exclusive. GST will be added before the final payment. Budgets in your applications should be indicative only. They will not be used to determine actual funding entitlements. You should complete the application using the same assumptions as for 2025 but using your estimated rolls for out years.

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Entitlement worksheet showing our growing numbers over 2026, 2027 and 2028?	
Regarding the standardised target of '95% of school leavers reach NCEA level 2'. We are offering a 4 year US diploma which will be awarded in year 13. What is the process for deciding what an 'NCEA level 2 equivalent is'? Is there a subject matter expert we can discuss this with while staying within the bounds of probity?	The Charter School Agency will work with sponsors that operate a charter school with different secondary qualification systems to determine equitable equivalencies in the model.
Gazette Notice: Our understanding of the legislation is that charter schools must enrol all eligible students unless the student/parents do not accept that the school operates consistently with its different character specified in the Gazette notice. There is no opportunity in the stage 2 application for a sponsor to propose a Gazette notice. We are very keen to specify a "different character"	Please outline your special character within your application. Placing a Gazette notice happens once the Agency and sponsor enter into a contract for the charter school.
Will charter schools have: 1. Access to MOE funded Microsoft Office 365 2. Access to MOE TELA scheme (laptops for Principal / Full Time Teachers) 3. Access to Network 4 Learning managed Internet service?	No, this is part of the cashed up funding, and sponsors have autonomy to use this money as they see fit to achieve their outcomes.
I have a question regarding stakeholder breakdown and community consultation. A lot of this info was provided in Round One of our applications and we provided letters of support and survey results from our community. Do you want me to repeat this again, provide the same letters again and survey results etc. Or can we say "refer to letters in round one" etc?	We will accept reference to your stage one application, as long as the information already provided clearly addresses the detail requested in stage two.

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When using the funding calculator**,** I understand we should enter the establishment roll numbers on the input tab. This is our evidence based assessment of student numbers in Term 5 of operation (February 2026 for our school). Does this mean we will receive funding for Salaries, Operations, Services, Establishment and Property based on these numbers in 2025 or does the establishment roll only apply to establishment funding?	Establishment funding for new schools is based on the establishment roll. Staffing and property funding for Year 1 will also be based on the establishment roll. Operational and cashed-up services components of funding are based on actual roll numbers so your Year 1 roll is appropriate. Using the Term 5 roll on these components will create an inflated budget. Converting schools are not eligible for establishment funding. However, there is provision for them to be compensated for reasonable related expenses, and this will be agreed through the negotiation process. Year 1 funding for these schools will be based on their 2025 provisional rolls.
To assist us in longer term financial strategic planning and viability assessments, can you please advise an expected/forecast/guidance rate of funding increase, per annum, for each of the funding pools - strategic, operations, services, property - for future years.	Budgets in your applications are indicative only. They will not be used to determine actual funding entitlements. You should complete the applications using the same assumptions as for 2025 but using your estimated rolls for out years.
In the Sponsor Capability sections, what is the expectation around the deliverables for the first three years and the accuracy, when the model is limited to one year and some variables within the equation still remain unknown/undetermined?	Budgets in your applications are indicative only. They will not be used to determine actual funding entitlements. You should complete the applications using the same assumptions as for 2025 but using your estimated rolls for out years.
How is the professional development of teachers, and their required resources, funded? It appears that there is no funding allowance for what would have normally been available under the administration grant.	Nationally provided PLD services will be cashed up and converted to a per-child rate, and are included calculator, including the 'output' tab and 'cashed up services' tab. Charter schools will also be able to access a range of other services, including regionally provided PLD, but will need to apply and meet the same eligibility criteria as State schools.
Is this funding fixed, or does it fluctuate with the roll return data?	As with State schools, the amount a school receives will be driven by roll returns on certain dates throughout the year.

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The attached guidelines state that the calculation of this allowance is determined after the settlement of the teachers collective agreements or following a change to base salary rates during the term of the Agreement. What is the process if the Charter Schools are outside of the collective agreement?	Sponsors will negotiate terms and conditions of employment with new staff (whether at new or converting charter schools). There is no expectation from the Ministry or Agency regarding the salary. This is a matter to be determined between the sponsor and new employee.
Do you have a guidance on when the Equity Index will be known?	EQI numbers for new schools will be assigned once the schools have been approved. In the interim, and for the purposes of using the funding calculator, you will need to make an estimate of your EQI number based on the size and make-up of similar schools in your location. You'll need to consider the socio-economic backgrounds of students and refer to this chart and this list of EQI numbers for existing schools Schooling Equity Index | Education Counts to help make your assessment. Your support partner should be able to help. Once a sponsor has been approved to open a charter school, the process for assigning an EQI will be the same as that for State schools: The Ministry of Education will assign an initial EQI number, and Year 1 payments will be made using this number. The EQI number will then be refined annually based on updated information as more details about the characteristics of the students at the school become available. Existing state schools that convert to charter school status should use their 2025 EQI as provided with their 2025 Provisional roll.
For the Healthy Lunches, it states that from September 2023 'staff working on school lunches must be paid at least $26 per hour'. With the autonomy of Charter Schools, do they fall outside of this requirement?	This is one of the services that charter schools will be able to apply for – it is not included in the cashed up amount for services. Charter schools will need to meet the same requirements as state schools for this service.
In the following scenario, are you able to please advise the applicable attendance code for non-classroom learning days.	Based on the scenario you've described, it may be Code Z or W. Code Z is appropriate for training programmes, whereas W is for Work Experience.

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The permanent timetable of the student is 2 days timetabled and in class, and 3 days where the student is actively participating in job training (apprenticeship/traineeship or other trade-related qualification) at a worksite or external training provider i.e. offsite. These three job training days are not undertaken as part of a trades academy, and we are assuming that no places are available in an alternative education facility. This model of education will be applicable for students in Years 11-13.	The Charter School Agency will work with sponsors that operate a charter school with different operating day, hour and term settings to determine how attendance should be reported and monitored and to inform the Ministry and the Authorisation Board. For now, please include an assumption around this within your application.
Can you please clarify with the roll return process and the funding dates, what is the process to calculate the funding entitlements as opposed to the date that the cash is received in the bank account? ROLL RETURN — ACTUAL ROLL COUNT — PROVISIONAL ROLL ESTIMA January (Jan to Mar) - 25 % - Provision — 125 — 130 April (Apr to Jun) - 33.3% actual or provisional — 160 — 150 July (Jul to Sep) - 50% actual — 175 October (Oct to Dec) - 100% actual — 150	As with State schools, the amount a charter school receives will be driven by roll returns on certain dates throughout the year. The number and timing of roll returns and payments will be agreed as part of contract negotiations between a sponsor and the Charter School Agency.

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Notifications for Applicants

Notification No. 4.0 | **Date:** 8 October 2024

Questions from applicants:

Question Topic	Answer
Should our teachers that we employ be able to join the Independent Schools Union? Are Charter Schools considered to be private schools in regard to the ability to be represented?	We suggest that you contact the Independent Schools Union directly to enquire as it would depend on their constitution, which we don't have knowledge of. For example, PPTA Te Wehengarua recently passed a change to their constitution which includes charter school employees.
If they leave the state system and then come back to it, is their sick leave entitlement still there for them when they get back?	If teachers leave a state school to go to a charter school and then return to a state school, their leave balance will be there for them when they get back. However, any charter schools service will not count towards the balance. This may change in future depending on any variations to the collective agreements.
Is there someone from the Charter School Agency that we can talk to about employment related questions?	We strongly recommend that sponsors seek their own independent employment law advice regarding any employment documentation, including employment agreements.

Are year 7-8 students able to access technology provision offsite at another school? I had the feeling that I had seen that we are able to, but I can't find this again?	Yes. The sponsor will need to enter into an agreement with a host school that provides technology instruction and negotiate a per-pupil fee.
In regard to the Notification released on 27th September, informing us the Draft Contract is not expected until w/c 21 October, can you please clarify the following: • the requirement for Applicants to complete Part Four of the form, relating to acceptance of General Terms and Legal Schedules etc.; and • the associated declaration in Part Six - Draft Agreement.	For both of these sections, please enter 'N/A' into the answer areas. This will not have bearing on the assessment of your application.
Associated with our question on attendance codes for students who are off campus, attending job training/apprenticeship etc. is the school entitled to receive funding for this? As they still have oversight responsibility for the student and management e.g. to ensure that the relevant training/work experience is being undertaken and progressing as required and providing the support to students.	Sponsors will continue to receive funding on a per-student basis if the arrangements are in accordance with the terms of the contract relating to curriculum and hours/days of instruction. The Charter School Agency will work with sponsors that are operating with different operating day, hour, and term settings to determine how attendance should be reported and monitored and to inform the Ministry of Education and the Authorisation Board.
In the legislation, 212V Property maintenance fee (1) This section applies if— (a) the sponsor owns the premises used by the charter school; or (b) the relevant integration agreement for a converting school in force immediately before the date of conversion allowed the proprietor of the State integrated school to charge attendance dues. All of the above is crossed out now in the legislation. Please confirm if this is a change and property maintenance fees are able to be charge if the sponsor leases the property?	Property maintenance fees cannot be charged for sponsor leased property, see section 212W(1) of the Education and Training Amendment Act 2024. This is not a change. The current legislation regarding property maintenance fees is covered here: Education and Training Amendment Act 2024 No 40, Public Act 41 New subpart 6A of Part 3 inserted – New Zealand Legislation

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This will change our budget forecasting and enrolment details, if so.	
We expect our Term Five roll to be 250 students, increasing to 300 students by the end of 2026. The decision has been made not to provide applicants with a copy of the draft contract before Stage II applications close, but can you provide some information about the financial implications of getting the Term 5 roll wrong? We are assuming that there will be a clawback during 2026 (if the projection is under) or a catch up for the 2025 underpay (including underpaid establishment costs) in the second quarter 2026 payment.	As with State schools, the amount a charter school receives will be driven by roll returns on certain dates throughout the year. The number and timing of roll returns and payments will be agreed as part of contract negotiations between a sponsor and the Charter School Agency. As with State and integrated schools, funding will be adjusted up or down to reflect roll changes. Budgets based on your roll estimates in your applications are indicative only. They will not be used to determine actual funding entitlements.
This query is about any additional amounts that Charter Schools may charge to families to overcome any shortfall in MoE Funding Entitlement; and how much flexibility there is in how such amounts may be spent. We understand that Charter Schools may charge families a compulsory Building Levy. Is it "ring-fenced" to only be spent on property-related expenditure (both Opex and Capex) or can it also be used for other expenditure? Can a Charter School also charge families a compulsory Education Outside the Classroom fee (e.g**.** for field trips, camps, cultural and sporting activities)? Is it "ringfenced" to only be spent on EOTC-related expenditure (both Opex and Capex) or can it also be used for other expenditure? We understand that a Charter School may also charge a voluntary contribution (e.g**.** to support the school's special character, additional learning support for specific learning needs etc). Is it "ringfenced" to any specific purposes or can it also be used for other expenditure?	Charter schools are covered by section 33 of the Education and Training Act, meaning that they must provide free enrolment and free education to any domestic student. They must not charge any fee for curriculum-related activity. This includes the examples given, such as education outside the classroom or anything that occurs offsite but that is related to the curriculum, or that there is a general expectation that students attend (e.g., field trips or a school camp). The only fee that can be charged is the property maintenance fee. This can only be charged for converting state-integrated schools which had an agreement to charge attendance dues, immediately before conversion. If your school is eligible and chooses to opt-in to the donations scheme, you cannot ask for donations, with the exception of overnight camps. If your charter school is not part of the donations scheme you may request donations. However, it is your responsibility to ensure the voluntary nature of these requests is clear to your parent and whānau community. This is the same for State schools.

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Are there any other amounts (compulsory or voluntary) that Charter Schools can charge to families? What, if any, restrictions are there in how such other amounts can be used?	Like State schools and kura, charter schools cannot charge domestic students a fee for enrolment or attendance or for delivery of the curriculum (for example, subject fees).
Is the output of the entitlement calculator suitable for our budgeting purposes?	Yes, the calculator is suitable for budgeting purposes. Budgets in your applications are indicative only. They will not be used to determine actual funding entitlements. You should complete the applications using the same assumptions as for 2025 but using your estimated rolls for out years.
Are the establishment funds subject to income tax?	This is a question for Inland Revenue. It may depend on the structure of the sponsor, such as if it is a charitable body.
Are we allowed to be a part of a kahui ako but just not access the funding. We have two offers to be part of local kahui ako and see this as a great way of being a natural part of the education landscape.	Yes, a school can be part of a Kahui Ako but will not receive funding for this.
Could I please clarify the donation question? Are we not allowed to charge a nominal voluntary donation fee at all like mainstream do? And if not, are we allowed to charge a stationary paper fee for workbooks and stationery?	If your school is eligible and chooses to opt-in to the donations scheme, you cannot ask for donations, with the exception of overnight camps. If your charter school is not part of the donations scheme you may request donations. However, it is your responsibility to ensure the voluntary nature of these requests is clear to your parent and whānau community. This is the same for State schools. Like State schools and kura, charter schools cannot charge domestic students a fee for enrolment or attendance or for delivery of the curriculum (for example, subject fees). Parents and whānau are expected to supply stationery. If they choose to purchase stationery from the school or kura, payment can be enforced.

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	However, parents and whānau are free to purchase stationery from any outlet. They cannot be compelled to buy stationery from the school or kura. You can find more examples and guidance here: Fees, charges and donations – Education in New Zealand.
I have a question about guessing an EQI number for a new school. If I used an EQI number similar to schools in our area, it wouldn't reflect the socio-economic makeup of the target students for the new school - i.e. students who have disengaged from school who, more than likely, will come from low-socioeconomic families. Do you have a suggestion as to how I might account for this in my application?	EQI numbers for new schools will be assigned once the schools have been approved. In the interim, and for the purposes of using the funding calculator, you will need to make an estimate of your EQI number based on the size and make-up of similar schools. Take into consideration the socio-economic backgrounds of students and refer to this chart and this list of EQI numbers for existing schools Schooling Equity Index | Education Counts to help make your assessment. Your support partner should be able to help. Existing state schools that convert to Charter school status should use their 2025 EQI as provided with their 2025 Provisional roll.
How does a new school go about obtaining 'special character' designation? Our new school would like to be able to provide students with a significantly different learning environment achieved through delivery models not offered in conventional school settings. We would like to offer a curriculum that allows students to access a relevant education designed around their individual needs. Providing innovative learning programmes that include core curriculum, scaffolded support around reintegration into formal learning, educational psychology, special learning programmes, community engagement, and wellbeing.	Charter schools will not have a 'special character' designation, but will have any religious, philosophical, or other distinguishing characteristics of the charter school notified in the Gazette. **Please outline any religious, philosophical, or other distinguishing characteristics of the proposed school within your application.** As part of the application and approval process, the Authorisation Board will consider the focus of the proposed sponsor which will include the religious, philosophical, or other distinguishing characteristics of the proposed school. • If the application is from a designated character school, a Kura Kaupapa Māori, or a State integrated school that wants to convert, the Authorisation Board will need to make a condition of approval that the character will be maintained. • If the application is from an ordinary State school wanting to convert, the Authorisation Board will need to make a condition of

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	approval that the school must not provide education with a special character or that is different from the character of ordinary State schools. Once approved, the Charter School Agency will negotiate and make the charter school contract with the approved sponsor. This will include specifying any religious, philosophical, or other distinguishing characteristics in the contract. The Minister will then, by notice in the Gazette, notify the establishment of the charter school which includes noting religious, philosophical, or other distinguishing characteristics of the charter school.
You have stated that the AB will make the decisions. Are you still following the following the application evaluation process you stated in the applicant briefing and provide "advice" or will the AB be free to fully assess themselves without advice from "officials"	We are following the assessment process we outlined which aligns with the legislative requirements of the Authorisation Board as summarised on the Charter School Agency website: The Authorisation Board will approve applications for new and converting schools. Applications will be considered by the Board with advice from the Charter School Agency, considering priorities and funding availability. The Board must also seek the view of the Secretary for Education and ERO. Link to full information can be found here: https://www.charterschools.govt.nz/about-charter-schools/key-features/
Given the update about the proposed contract not being shared until after submissions are received there is no expectation from the agency of a response for part 4 of the sponsor response form?	Please enter 'N/A' into the answer area for Part Four. This will not have bearing on the assessment of your application.
Our new school will be a middle school preparing disengaged students for secondary education. These will be difficult students from complex and difficult backgrounds. Do you think we might be able to access the Staffing incentive allowance to attract quality teachers and a quality principal? If so, how would we go about getting that designation?	This allowance is included in the collective agreements for State school employees. Charter school employees cannot be covered by these collective agreements so are not eligible. However, charter school sponsors have considerable flexibility in the terms of employment they choose to offer their staff including the components that make up their remuneration.

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Will MOE be able to simply 'direct' students who have been excluded from other schools to a new charter school?	Yes. If no arrangements have been made for the excluded student to attend another school, the Secretary for Education would be able to either: • lift the exclusion if satisfied this is appropriate; or • arrange, and if necessary, direct the board of any other State school (except for a State integrated school) or sponsor of a charter school to enrol the student at the other school; or • direct the parent of the student to enrol the student at a distance school. If the Secretary directs a charter school that has a religious, philosophical, or other distinguishing characteristic (as notified in the Gazette when the school is established) to enrol the excluded student and the parent of that student does not agree with the characteristic, the school can refuse to enrol the student.
If our school's special character includes building a relationship with each family and working together with those families – a MOE directed student could potentially undermine that.	Charter schools will not have a 'special character' designation, but will have any religious, philosophical, or other distinguishing characteristics of the charter school notified in the Gazette. Building relationships with families would not fall into religious, philosophical, or other distinguishing characteristics. Charter schools must have regard to any statement of national education and learning priorities.
When wanting to employ a teacher as a migrant worker, does a Charter school have to apply for accreditation (AEWV) or does the same rule apply than for public schools and state-integrated schools (no application for accreditation)?	Charter Schools and all schools, regardless of whether they are state or state integrated schools, who want to hire an overseas teacher under the Accredited Employer Work Visa (AEWV) have to apply to be an accredited employer. There is no exemption to the fees for the education sector (or any other sector) to these requirements.

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Charter School Agency

Notifications for Applicants

Notification No. 5.0 | **Date:** 9 October 2024

Questions from applicants:

<table>
<tr><th>Question Topic</th><th>Answer</th></tr>
<tr><td>Please provide the commercial lease rates being used by the Ministry to determine the property funding in each proposed location for applicants.</td><td>Property funding rates are based on the notional lease rates in the state sector, not on commercial lease rates. The 2025 leased-based funding rates for Charter schools that are leasing from a party other than the Ministry of Education are:
<table>
<tr><th></th><th colspan="2">Primary schools</th><th colspan="2">Secondary schools</th><th colspan="2">Composite schools</th></tr>
<tr><th></th><th>First 100 students</th><th>Additional students</th><th>First 200 students</th><th>Additional students</th><th>First 200 students</th><th>Additional students</th></tr>
<tr><td>Major urban centres</td><td>$4,125.04</td><td>$1,738.70</td><td>$4,687.64</td><td>$2,151.62</td><td>$3,909.86</td><td>$2,744.36</td></tr>
<tr><td>Other areas</td><td>$2,313.28</td><td>$1,676.07</td><td>$4,083.02</td><td>$1,714.62</td><td>$3,497.94</td><td>$1,767.45</td></tr>
</table></td></tr>
<tr><td>In looking at internal self-review systems - are the NELPs applicable in the charter school space, or will there be a high level framework across schools that is applicable?</td><td>Yes, NELPs are applicable. Charter schools must have regard to any statement of national education and learning priorities.</td></tr>
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