

Specification

Title

Advisory Services for Secondary School Initiative Planning

Introduction

OIST is exploring the potential establishment of a secondary school initiative that contributes to the sustainable development of Okinawa through world-class STEM education, while aligning with OIST's recruitment and retention needs.

Following prior research on educational needs and options of OIST families, OIST is entering a planning phase that requires strategic, financial, legal, and operational analysis to support informed institutional decision-making.

Due to the evolving nature of the project and the need to respond to internal governance deliberations and external conditions, flexibility in scope and approach is essential.

Goal

The goal of this engagement is to provide advisory, analytical, and strategic support to OIST as it evaluates and advances planning for a potential secondary school initiative. The engagement is intended to support OIST in assessing options and determining next steps, rather than executing fixed predetermined outputs.

Contract Term

From date of contract execution to March 31, 2027.

Scope of Work

The contractor shall provide advisory and analytical support services related to the planning and feasibility evaluation of a potential secondary school initiative.

Services may include, but are not limited to:

- Strategic planning and scenario development
- Financial modeling and sustainability analysis
- Governance and legal structuring considerations
- Regulatory pathway assessment
- Risk identification and mitigation analysis
- Development of implementation concepts and timelines
- Preparation of briefing materials and presentations
- Facilitation of workshops or strategy sessions

Specific priorities and focus areas may be adjusted during the contract period in response to:

- Institutional leadership direction
- Board discussions
- Regulatory considerations
- Emerging findings

The contractor shall work in close coordination with OIST staff to adapt deliverables as needed.

Deliverables

Deliverables will consist of advisory outputs and work products necessary to support OIST's evaluation and planning of the proposed initiative. The format, depth, and timing of deliverables will be determined in consultation with OIST and may evolve based on project needs.

The engagement will be structured in two phases as follows:

- Phase 1: From contract start date to October 31, 2026
- Phase 2: From November 1, 2026 to March 31, 2027

Each phase shall include outputs appropriate to the stage of the engagement.

Phase 1 is expected to focus on analyses, scenario development, and materials to support direction-setting and institutional discussions.

Phase 2 is expected to focus on further development and refinement of analyses and recommendations, supporting the advancement of the selected direction and preparation for potential next steps.

Inspection

OIST will review and inspect deliverables upon submission. The contractor's presence is not required for inspections.

Payment

Payment shall be made in two phases as follows:

- Phase 1: From contract start date to October 31, 2026 (50% of the total contract amount)
- Phase 2: From November 1, 2026 to March 31, 2027 (50% of the total contract amount)

Payment for each phase shall be made upon completion of the respective phase, submission of an invoice, and OIST's confirmation that the outputs for the phase are sufficient to support the intended planning and decision-making at that stage.

In the event that the project is discontinued during Phase 2 based on OIST's decision, payment shall be made on a prorated basis up to the end of the month in which the discontinuation is formally decided.

Invoices must be submitted upon completion of each phase (or applicable period in the case of early termination) and payments will be processed within 30 days.

Communication Rules

Regular coordination meetings will be held weekly and, in principle, conducted online.

Japanese will be the primary language for regular meetings, while English may be used as needed for stakeholder meetings and written communication.

Eligibility

Applicants must demonstrate:

- Experience in the establishment of schools or in providing advisory/support services for school establishment.
- Professional experience in international schools implementing recognized international curricula (e.g., IBDP, A Levels, AP, or equivalent).
- Understanding of the educational and social context of Okinawa and/or familiarity with OIST.

Other Conditions

1. A service contract will be concluded using the standard OIST contract form.
2. All deliverables and intellectual property generated through this project will be owned by OIST.
3. Confidentiality and data protection standards outlined in the standard contract form must be adhered to.
4. Outputs from prior research will be made available to all applicants, subject to the execution of a non-disclosure agreement (NDA).
5. The proposed price shall include all costs necessary for the performance of the services, including travel, accommodation, and any other related expenses.