

The new planning and reporting framework

A new planning and reporting framework was introduced by the Education (Update) Amendment Act 2017, and was due to come into effect in 2020. The passing of the Education Amendment Act 2019 means the start date for these changes is now 2023. Therefore, in 2020, 2021 and 2022 boards will continue to develop their school charters | tūtohunga and report against their school charters.

Preparing for 2023

For each of the 2019 – 2022 years the board can best prepare for when the new framework is in place by following the planning and reporting cycle on page 2, and the key strategic planning principles on page 3.

This will enable the board to:

- > more effectively consult and plan ahead for the highest level of achievement for its students | ākongā
- > monitor progress and report on that progress to the school community
- > be well prepared for the new planning and reporting framework in 2023

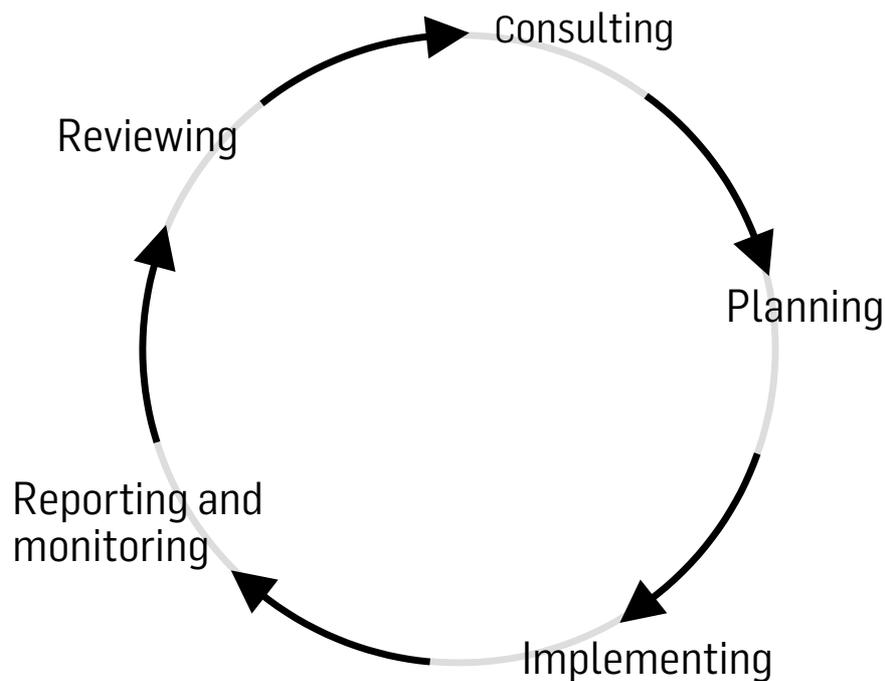
Each of the next three years is an opportunity for the board to:

- > use the planning and reporting cycle, including its consultation processes, to ensure parents, caregivers, whānau, hapū, iwi, mana whenua, staff | kaiako and students are consulted to incorporate their aspirations for their school
- > ensure the charter aligns to the suggested focus areas for strategic planning set out on page 2
- > apply strategic thinking to board planning
- > make sure the charter clearly sets out the boards' direction to the school community

Board good practice workplan to meet 2019 – 2022 requirements

1. **Aug – Oct:** board updates its charter (including strategic plan) in consultation with its community. It works to a 3-5 year strategic plan. Charter (including strategic plan) aims reflect the board's primary focus on student achievement, and its achievement challenges, if the school belongs to a community of learning | kāhui ako.
2. **By Nov meeting:** board signs off on the principal's annual plan. It has aims or targets that implement those in the charter (including strategic plan) on a year by year basis. Principal reports regularly to the board on progress with the aims or targets in the annual plan, presenting clear and well-analysed data on student achievement.
3. **By Dec meeting:** board signs off on draft budget for next financial year
4. **By 1st meeting of year:** board signs off on final budget for next financial year
5. **By 1st meeting of year:** board is presented with draft annual financial report
6. **By Feb meeting:** board signs off on its updated charter and analysis of variance (prepared by principal for the board if any of the goals are not, or only partially, achieved)
7. **By Feb meeting:** board is advised that the principal's performance agreement has been signed off. (This is prepared in accordance with the board's performance appraisal policy. Amongst other things, the board appraises the principal's performance against the achievement or otherwise of their performance objectives the board has set for that year)
8. **By 1 March:** board submits its updated charter to the Ministry of Education, including: strategic plan, annual plan, analysis of variance.
9. **As soon as possible once finalised:** board publishes its annual report, including any analysis of variance (remove personal identifying information) on a website controlled by its school. This is one way the board reports on progress to its school community. If the school has no website the Ministry of Education can host website publication of the board's annual report.
10. **By 31 May:** board submits its annual report for the previous financial year to the Ministry of Education (including its analysis of variance).

Planning and reporting cycle



Some focus areas for charters for 2020, 2021 and 2022

- > The board's primary focus is always student progress and achievement
- > Focus on lifting student progress and achievement in the Government's three priority learner groups: Māori students, Pacifica students and students with special learning and behaviour needs
- > As part of the board's focus on student progress and achievement, an explicit focus on planning for a school that is:
 - > emotionally and physically safe for both staff and students
 - > inclusive for all

These factors are recognised as critical for lifting student achievement, and are now enshrined in [schedule 6\(5\)](#), Education Act 1989

- > Areas of focus identified during consultation with the school community

Purpose

- > Establish a pathway for achievement of equity and excellence
- > Focus on the areas identified through internal and external evaluation that need strengthening; with the aim of improving outcomes for students | ākonga through improving teaching and learning
- > Make the role of stakeholders in achieving the goals clear
- > Be a guiding document for alignment and coherence in all decision making
- > Drive the direction, resource allocation and daily actions of the school | kura
- > Allow for rigorous and detailed evaluation of the effectiveness of your strategies

Structure

- > Be simple and precise enough to be a living document for the board | poari, and engaging and easily understood by the community

Use, monitoring and review

- > Ensure that every board | poari meeting focuses on identified priorities and goals for achievement of equity and excellence
- > Revise if priorities change
- > Evaluate regularly so progress made towards the goals is monitored and communicated to staff and the school | kura community. This keeps everyone focused on achieving the shared goals

Consultation and communication

- > Develop in partnership with your communities and reflect their values, enabling shared ownership of the plan

- > Ensure students | ākonga have a voice in the development of the plan
- > Communicate widely, so all members of the school | kura and its wider communities are aware of what the focus is for the next 3-5 years
- > Write appropriately for the audience: staff, students | ākonga, parents and whānau, communities, mana whenua and iwi

Contents

- > Small number of aspirational goals based on identified areas for improvement in teaching and learning, with a focus on increased equity and excellence. Too many goals will become distracting and compete for resources
- > Goals should not be for business as usual tasks (goals that state "continue to ..." imply that it is already embedded and business as usual)
- > Focus on students | ākonga and what will support their educational outcomes, in particular, those groups of students | ākonga who are currently not achieving or at risk of not achieving
- > Clear, identified outcomes and ways in which progress will be measured and by when
- > Contain goals that align to your Community of Learning | Kāhui Ako achievement challenges
- > Set out at a high level how the board | poari intends to use its resources to achieve the outcomes that are set out in the plan
- > State integrated schools, designated character schools, and designated character schools that are Kura Kaupapa Māori, ensure their strategic plan reflects their special character / different character and (if applicable) special characteristics

Support and resources

New Zealand School Trustees Association

Te Whakarōputanga Kaitiaki Kura o Aotearoa

www.nzsta.org.nz

Advisory and support centre

0800 782 435

Ministry of Education

Te Tāhuhu o te Mātauranga

www.education.govt.nz

<http://education.govt.nz/school/schools-planning-and-reporting/>

