

# Schools' Planning and Reporting

## Requirements for 2019

The legislative requirements for school planning and reporting documents remain the same for 2019.

**By 1 March 2019**, a board must submit its:

- ▶ 2019 charter
- ▶ analysis of variance (reporting against the 2018 charter).

**By 31 May 2019**, a board must submit its 2018 annual report (including its audited annual financial statements).

## The 2019 Charter

The Education Update Amendment Act 2017 requires that, in the future, school boards will have to develop a strategic plan rather than a charter.

The Education Amendment Bill 2018 is currently being considered by Parliament. Under the Bill, from 1 January 2020, a board's existing 2019 charter will automatically become its 'first Strategic Plan'. Therefore the 2019 charter provides an opportunity for boards to:

- ▶ use the planning and reporting cycle (see diagram on the right), including their consultation processes to ensure parents and whānau, staff, iwi, and students are consulted to incorporate their aspirations for the school/kura
- ▶ ensure the charter aligns to the key principles of strategic planning (see page 2)
- ▶ apply strategic thinking to their planning (see reflective questions on page 2).

### FOCUS AREAS FOR THE 2019 CHARTER

- ▶ Boards are encouraged to have an explicit focus on equity and excellence in student outcomes.
- ▶ Boards should demonstrate how they will support the progress, achievement and wellbeing of all students (particularly those who are at risk). Refer to the National Administration Guidelines (NAGs).
- ▶ The charter should make the direction set by the board clear to the school community.

## The Planning and Reporting Cycle

A focus on continuous improvement for achievement of equity and excellence

### Planning: Gather information

The board will need information and evidence to support the development of its strategic plan and on which to base its decision making. The board will need information about:

- Robust and analysed current and trend data on student progress, achievement and wellbeing
- Resources available to allocate towards achieving goals
- Competing priorities for resources.

How could the data be summarised so that the board has a comprehensive understanding of the progress of cohorts of students in relation to expected levels of progress, achievement and wellbeing?

### Planning: Prioritising

Identify the students or groups of students that are not achieving or at risk of not achieving. What goals will need to be set? What does the evidence and consultation tell the board about which goals should be prioritised? Do staff, students communities and iwi support the prioritised goals?

### Planning: Developing the charter

A charter sets out the board's proposed actions and allocated resources for achieving a small number of key goals to improve student progress, achievement and wellbeing for equity and excellence. A charter includes broad, long-term goals as part of the strategic plan which are broken down into measurable targets in the annual plan/s.

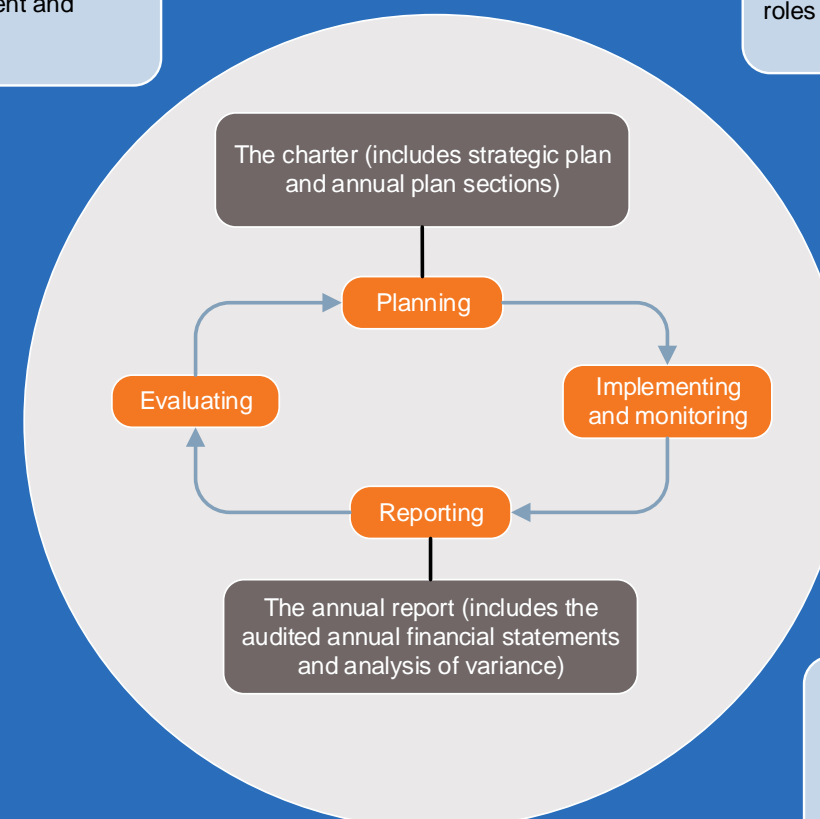
A charter should identify the stakeholders that play a role in achieving the goals. Are the stakeholders and their roles clear within the charter?

### Planning: Consultation

Involve school leadership team, staff, students, communities and iwi in the planning stage to identify shared vision and goals for students.

### Evaluating

What does the level of student progress, achievement and wellbeing tell the board about how successful the strategies were? What changes might the board need to make to the goals in the strategic plan or the targets in the annual plan? What achievement and evaluation information will be needed to set revised goals or targets?



### Implementing and monitoring

The board should use the charter at every board meeting to review progress made towards achieving the goals and targets. What is working well and what might need to change?

### Reporting

Reporting progress to staff, students, communities and iwi highlights the progress made and provides an evaluation of what actions have and have not been successful. What changes may need to be made?

Source of circle diagram: NZSTA: Effective governance: Charter review and the planning and reporting process.2015.

# Schools' Planning and Reporting

## Strategic Thinking and Planning for Equity and Excellence

### Strategic Planning: Key Principles

#### 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 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.
- ▶ 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, and engaging and easily understood by the community.

#### Use, Monitoring and Review

- ▶ Ensure that every board 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 community. This keeps everyone focussed 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 have a voice in the development of the plan.
- ▶ Communicate widely, so all members of the school and its wider communities are aware of what the focus is for the next 3 years.
- ▶ Write appropriately for the audience; staff, students, parents and whānau, communities and iwi.

#### Contents

- ▶ Small number of stretch/aspirational goals based on identified areas for improvement in teaching and/or 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 and what will support their educational outcomes, in particular, those groups of students 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 intends to use its resources to achieve the outcomes that are set out in the plan.

### Strategic Thinking: Reflective Questions

*Boards may find these questions useful to guide their strategic thinking*

- ▶ Do your goals focus on achieving equity and excellence in your school?
- ▶ What are your communities' aspirations and values? How will your board ensure these are reflected in your strategic plan?
- ▶ What are your students' diverse needs and aspirations? How will you incorporate student voice into your goals?
- ▶ How will you involve whānau, hapū and iwi in your planning processes and how will their values and priorities inform the goals you set for your students? How will you ensure your planning supports Māori students' identity, language and culture?
- ▶ What strategies may you need to consider to improve the success of your Pacific students? How will you ensure your planning supports Pacific students' identity, language and culture?
- ▶ What strategies may you need to consider to ensure the success of your students who require learning support?
- ▶ To what extent have you considered external evaluation, national priorities and current research when developing your goals and prioritising your resources?
- ▶ What does your ongoing internal evaluation tell you about which areas of your school need focussed attention?
- ▶ What trends and patterns does your previous years' data show? How will you use this information when setting and prioritising your goals?
- ▶ Does the information provided to your board include a wide range of both quantitative and qualitative information you need to make informed decisions? What other information might you need?
- ▶ Has data been gathered from across the whole school? Do you have information about cohorts of students that may need prioritising (eg. those with additional learning needs)?
- ▶ What are your Community of Learning | Kāhui Ako achievement challenges (or shared goals of other cluster)? How do your school's own goals align with these?
- ▶ What high-level actions will you take to achieve your goals?
- ▶ How will you prioritise goals?
- ▶ What evidence do you have to support your decision making?
- ▶ What resources will you need to allocate for these actions?
- ▶ What difference will your goals and actions make for your students and how will you know?
- ▶ Are expected outcomes for students defined clearly for each goal set, as a basis for later evaluation of your success?