



# School planning and reporting: targeted engagement follow-up

Information and questions for:  
Schools, whānau, mana whenua, iwi, hapū and communities

## Background on the new Planning and Reporting framework

A new planning and reporting framework for State schools and kura comes into effect on 1 January 2023.

The new framework is intended to improve educational outcomes for all students. Strategic planning is linked to the new primary objectives for school boards set out in section 127 of the Education and Training Act 2020.

The key change is that under the new framework, school boards will be required to publish a three-year strategic plan and annual implementation plan, replacing the current annual school charters.

Boards will still be required to develop an annual report which contains annual financial statements and a statement setting out any variance from the plans.

The new framework is set out in the Education and Training Act 2020. However, the detailed requirements need to be set in regulation.

Regulations are legislative rules that deal with the details of implementing the planning and reporting framework - including technical requirements and things that need to be updated frequently.

## Items that regulations could include

The Education and Training Act 2020 states that we could make Regulations to set out requirements for:

- the content of strategic plans and annual implementation plans
- the content of annual reports/annual financial statements and statements of variance
- the form of strategic plans, annual implementation plans and annual reports
- the form of reports on the performance of a school's learners
- the information that must be included in reports on the performance of a school's learners
- the consultation the school needs to do in developing their plans
- when strategic plans must be prepared and submitted, when they commence, and when they expire

## Purpose of this second round of engagement

During our previous round of engagement in May 2022, we asked questions on what you thought good strategic planning and reporting looked like. Drawing on that feedback, we have developed some ideas for what could be included in planning and reporting regulations and made compulsory for all boards.

We now want to test these ideas with you to ensure that we understand what you think should be made compulsory for all boards through regulations, and what aspects of planning and reporting you think schools and kura should be able to decide for themselves. We also want to know what support and guidance you think, schools, kura and communities will need to give effect to the regulations and other school planning and reporting tasks.

## What we heard in our previous round of engagement on Planning and Reporting

During our previous targeted engagement, we heard from over 350 board members and principals and over 400 parents, whānau and community representatives.

The key themes that we heard from those who completed the survey were:

- **Planning and reporting should give effect to Te Tiriti o Waitangi**
  - Planning and reporting should demonstrate how schools have given effect to Te Tiriti o Waitangi and have progressed the achievement standards of Māori students.
- **There needs to be better communication and relationship building between schools and their whānau and communities**
  - Plain language should be used in the planning and reporting process
  - There needs to be on-going communication and feedback loops between schools and their whānau and communities - and multiple forms of communication should be used such as, meetings (face-to-face and online) social media, school websites, emails, phone calls, and texts
  - Schools should regularly provide feedback on proposed changes to school plans, and incorporate community voice in this process.
- **Planning and reporting should reflect the local character of whānau and the community**
  - School plans and reports should recognise the unique character and needs of local communities.
  - A 'one-size-fits-all' approach to planning and reporting would leave out content specific to that local school, whānau, and community.

- Planning and reporting should be consistent but tailored to the needs of the school and its community.
- **Learners should be at the centre of planning and reporting processes**
  - Schools and their communities approach planning and reporting from different perspectives
    - Boards and principals tend to approach planning and reporting in terms of processes and compliance requirements.
    - Parents and whānau think about planning and reporting in terms of supporting their own child[ren]'s personal experience.
  - Planning and reporting should:
    - incorporate a holistic approach to learner needs.
    - include information on student achievement, school attendance data, measures of learner safety, health, physical and emotional wellbeing, and equity.
    - demonstrate how matters of equity and diversity are being addressed for children from different cultures, sexual orientations, and for those with disabilities and/or learning support needs.
  - It is important that schools include what students think is important in the planning and reporting process and provide students safe and confidential ways to give their feedback.
- **Timing and content of Strategic/ Annual Plans and Reports**
  - Some schools, whānau and communities emphasised that the proposed 3-year strategic planning timeframe was too long and that annual planning updates would allow greater flexibility to address immediate or evolving concerns. These responses were raised in the context of problems such as Covid19 where a more flexible approach would have been preferred.
  - We also heard from respondents that in addition to the items on Te Tiriti progress and learner-centred data, strategic planning and reporting could also incorporate these components:
    - Priorities, goals, and obstacles
    - Financial spending and expectations
    - Property and asset management
    - Environment sustainability plans
    - Numeracy and literacy strategies; and
    - Progress on achieving Kahui Ako goals.

## Options for strategic planning and reporting which could be set out in regulations

From what you have told us about what matters to you and what good strategic planning looks like, we have identified the following things which could be included in the planning and reporting regulation.

### Content of Strategic Plans and Annual Plans

Based on what you have told us, we propose that we could make regulations to ensure that strategic and annual plans cover the following:

Boards must include in their strategic plans:

- the school's/community's vision and values
- the actions (strategies) the board will take over the three years to achieve (or making progress towards achieving):
  - their primary objectives set out in section 127 of the Act; and
  - any other objectives identified after consulting students (when appropriate) whānau, staff and the school's community.
- the strategies for identifying and catering for:
  - students that are not achieving or are at risk of not achieving
  - students with disabilities and learning support needs, including gifted children
  - the needs of Māori students at the school;
  - the needs of Pacific students at the school; and
  - areas of the curriculum that need particular attention
- the teaching and learning programmes, policies, plans and targets to address the needs of the above student groups or aspects of the curriculum that need particular attention
- a description of the general deployment of resources and the general timing, within the three years, for giving effect to their strategies (when they will do what and how)
- the measures to be used to chart progress for achieving (or making progress towards achieving) their objectives
- How the Board will evaluate their actions and their impact on learner outcomes

Boards are required to have particular regard to the national education and learning priorities in determining their priorities.

Annual implementation plans should include the actions, resourcing, evidence, measures and targets relative to the objectives in each year.

### Questions on the content of strategic and annual plans

1. Should regulations set out requirements for the content of school strategic and annual plans or should this be left to each Board (with their communities) to decide?
2. Are there items that we have proposed that you don't think should be compulsory? If so, what are your reasons for excluding these items?
3. Are there other items that are missing? If so, what are your reasons for including these items?

## Content of Annual report / statements of variance

We are continuing to work through feedback received from our first round of engagement and assess what this could look like as regulations. We will provide further information on proposed regulations for annual reports/statements of variance later this year when we will hold a formal public consultation on the draft regulations.

Regulations could require that performance information in relation to objectives should be in plain language and accessible to whānau, school and kura communities, hapū and iwi. This could include how Boards report to their communities (and the Secretary of Education) on student achievement and performance.

## Timing for strategic plan and annual plans

Regulations on the timing for strategic and annual plans could include the following:

- When the strategic plan is to be prepared and published
- When the annual implementation plan is to be prepared and published.
- When the 2022/2023 charters/strategic plans expire – we are proposing 31 December 2023
- First strategic plans under the new framework is required – we are proposed 1 January 2024

## Questions about the timing of plans and reports

4. Are there any other things about the timing of Strategic plans and Annual plans that you think should be set out in regulations?

## Support and Guidance

5. What supports and guidance would you like the Ministry of Education to provide you with to assist with the school planning and reporting process?