

Nau mai haere mai!
Welcome to

Board Monitoring and Reporting

Name presenter

.....



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Preparing our minds for the session

E te hui

For this gathering

Whāia te mātauranga kia mārama

Seek knowledge for understanding

Kia whai take ngā mahi katoa

Have purpose in all that you do

Tū māia, tū kaha

Stand tall, be strong

Aroha atu, aroha mai

Let us show respect

Tātou i a tātou katoa.

For each other.

Where this learning fits

This Event

Board Monitoring and Reporting

Learning Library

School Planning & Reporting
Workshops and Webinars 2023



Help for Boards

School Planning & Reporting
Community Engagement

NZSTA Resource Centre

www.nzstaresourcecentre.org.nz

What we'll cover

- The connection between your school's vision, strategic goals, and annual implementation plan.
- Using your planning documents to monitor progress.
- How tracking progress towards goals starts with setting expectations.
- Reporting on progress.



Part 1

The connection between your school's vision, strategic goals, and annual implementation plan.



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The School Planning and Reporting Process



1. Prepare for planning
2. Understand who is in your community
3. Engage with your community
4. Set the direction for your school or kura
- 5. Share your plan**
- 6. Deliver and improve**
7. Reflect on your progress

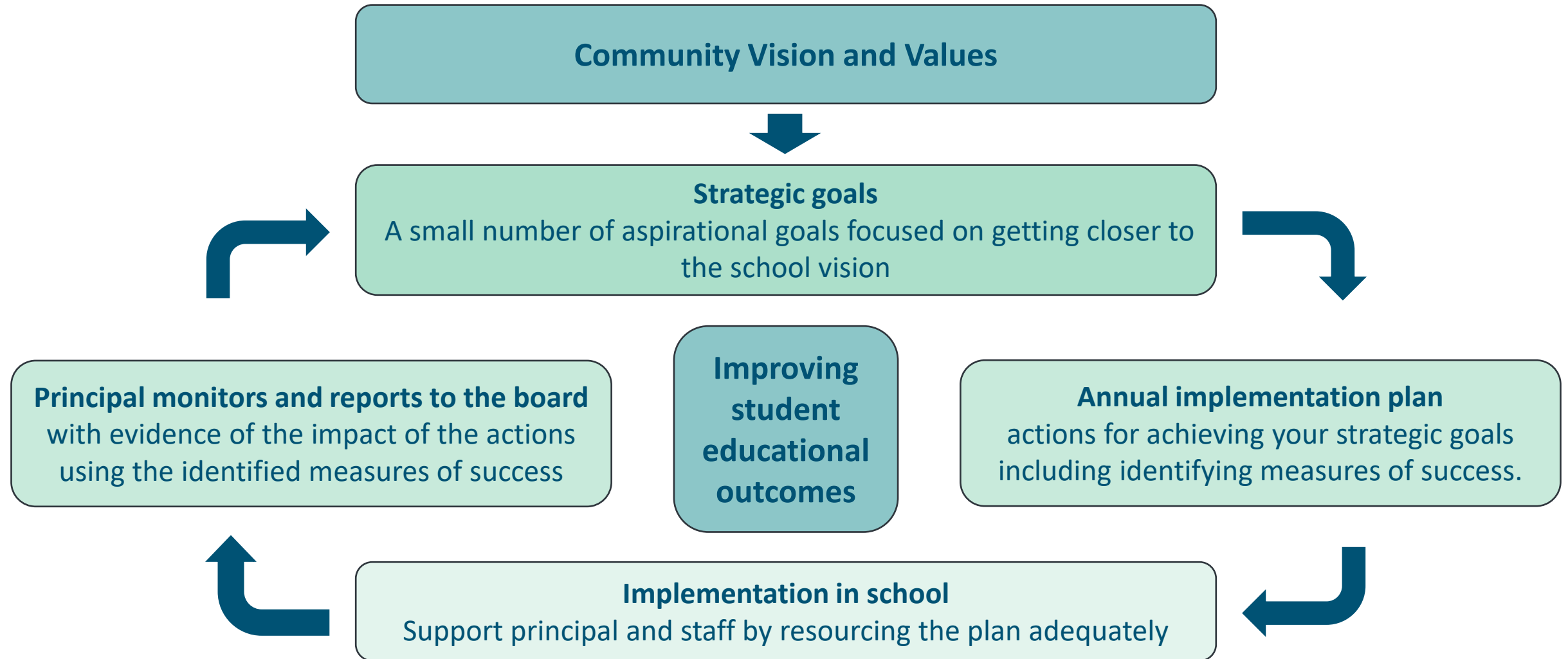
When do we need to publish our plans?



- | | |
|---------------|---|
| 1 Jan | Strategic plan effective from this date |
| 1 Mar | Strategic plan published and submitted to the Secretary |
| 31 Mar | Annual implementation plan prepared and published |
| 31 May | Annual report published and submitted to the Secretary |

- | | |
|---------------------------------|--|
| 31 Mar | Annual implementation plan prepared and published |
| 31 May | Annual report published and submitted to the Secretary |
| After Triennial Election | Consult your school community and draft your strategic plan for the next three years (2026 – 2028 inclusive) |
| 31 Dec | Two-year strategic plan expires |

How the plans work together for school wide improvement – an overview



Part 2

Using your planning documents to monitor progress



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Strategic Plan Template - Ministry of Education

Vision Statement			
Summary of the information used to develop this plan (How did you create this plan?)			
Strategic Goals	What do you expect to see?	How will you make progress?	How will you measure success?
Your priorities for improvement.	What is the anticipated result at the end of 3 years? What evidence will you see of this?	How will this be achieved?	• How will you know how well you have achieved your goals? • How will you evaluate the impact and learn about what worked, why it worked, and what to do next? • What success indicators/tools/rubrics will you use? • What sources of evidence will you gather to support your evaluation? • Who will be involved in gathering and making sense of the evidence?

Activity

Measuring success

In pairs or groups, brainstorm the following:

What could you measure to show trends and patterns in one of the following:

- student engagement,
- staff and student well-being,
- effectiveness of community consultation,
- embedding of Special Character, or
- a goal from your own strategic plan?



Example - Strategic goal measurements

Strategic Goals	What do you expect to see by the end of 2025?	How will you make progress?	How will you measure success?
All our ākonga/students will achieve their full potential in a caring and engaging learning environment that meets their individual needs.	Ākonga, teachers and whānau, are excited and engaged in their learning at school and in the local environment.	Actions to be taken to achieve goals.	• Improved attendance rates. • Decreased staff absenteeism. • Improvement in the engagement of those previously less engaged, as seen in PB4L (Positive Behaviour for Learning) reporting. • Fewer referrals and lower-level incident reports. • Academic results showing increased progress for all students. • Acceleration for those requiring additional support. • Fewer concerns and complaints – minor and resolved at the lowest level possible. • Surveys reporting greater connections and satisfaction at school.
	Staff will be better equipped with strategies for engaging and teaching students with diverse learning styles.		
	School curriculum will be based on the local environment, teach life skills and mind health skills.		

Part 3

How tracking progress towards goals starts with setting expectations



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How does the principal know what your board wants reported and when?

- Your board should communicate the information you expect to see in the principal's report.
- Most principals refer to the following:
 - The strategic plan and annual implementation plan (*primarily*).
 - Board policies (*may* include items the board requires regular reporting on).
 - Board workplan (*should* include a schedule for reporting against strategic outcomes)

Board work plan example



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2024 Area for review	Board meeting dates					
	Feb	March	May	July	Nov	Dec
Strategic plan, annual implementation plan, and annual report timing	Confirm strategic plan and annual implementation plan	Present planning documents to community, publish on website and submit to MOE	Annual report due – publish online and submit to MOE	Monitoring annual implementation plan	Review of annual implementation plan	Confirm draft annual implementation plan 2025
Board policy review and assurances	Board responsibilities Code of conduct		Employment responsibility policies	Within school employment assurances	Asset management policies and assurances	Role of the presiding member
Inclusion & well-being	Student transition focus	Local Māori community consultation	Staff well-being survey	Māori student focus	Student transition focus	
Board process requirements	Appoint presiding member Approve budget	Accounts to auditor	Community consultation – 2023 annual report	Parent reporting Roll return 1 July Succession planning	Prepare draft budget in line with annual implementation plan	Parent reporting 2025 draft approved

Activity

Tracking progress

Think about the measures of success that we identified in the last activity.

In pairs or groups, brainstorm the following:

- When would you expect to see reporting on this?
- What are some of the ways this reporting could be presented to your board?



What questions could you ask about the data?

- Do we know what the information presented means?
- How do we know it is good quality data?
- How does it relate to our goals?
- What do we do with our findings?

Part 4

Reporting on progress



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Annual report content

Along with your audited financial accounts, *every* board must submit a report on:

- **Statement of variance**
 - Progress the school has made against the targets set out in your annual implementation plan.
- **Your evaluation of all students' progress and achievement**
 - How well are all your students progressing and achieving across the national curricula.
- **How the school has given effect to Te Tiriti o Waitangi**
 - Describing anything the board is doing to meet its obligations under s127(d), the board's primary objectives.
- **Your compliance with your employment policy**
 - Your policy must comply with the principles of being a good employer.

Statement of variance: reporting progress against annual implementation plan targets

Strategic Goal 1 (as per the strategic plan)				
Annual Target/Goal (as per the annual implementation plan)				
Actions List all the actions from your Annual Implementation Plan for this annual target/goal.	What did we achieve? What were the outcomes of our actions? What impact did our actions have?	Evidence These are the sources of information the board used to determine those outcomes.	Reasons for any differences (variances) between the target and the outcomes Think about both where you have exceeded your targets or not yet met them.	Planning for next year – where to next? What do you need to do to address targets that were not achieved? Consider if these need to be included in your next Annual Implementation Plan.
Action 1				
Action 2				
Action 3				

Activity

Reporting to your community

In pairs or groups, brainstorm the following:

When reporting back to your community...

- What methods have you used that have been successful?

OR

- What methods do you think might be appropriate for a particular community group?



Next steps from here

- Discuss and decide on measures of success for reporting.
- Agree on how and when identified measures of success will be reported to the board.
- Ensure your board's workplan and policies reflect any board expectations for reporting.
- Consider the best method for communicating your plans and annual report back to your school community. You may require more than one method.
- Publish all your documents online and share your Strategic Plan and your Annual Report with the Ministry of Education via your Secure Data Portal.

Resources and support

NZSTA



www.nzstaresourcecentre.org.nz



Advisory Support Centre

0800 782 435 or email govadvice@nzsta.org.nz

MoE (Ministry of Education)



www.education.govt.nz/school/schools-planning-and-reporting/



Your Te Mahau Education Advisor

Closing the session

Ka whakairia te tapu

Kia wātea ai te ara

Kia turuki whakataha ai

Haumi e. Hui e. Tāiki e!

Restrictions are moved aside

So the pathway is clear

To return to everyday activities

Enriched, unified and blessed!



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Ngā mihi nui!
Thank you!