

Nau mai haere mai, welcome to Strategic Planning and Reporting

We will begin once all participants have joined the session.

All cameras and microphones have been turned off due to the number of participants.

A copy of this presentation will be made available after the session.

Whakawhanaungatanga

Is the process of establishing links, making connections and relating to others.

Your host

Rod Lane
NZSTA Learning and Innovation Manager

Your presenter

Gigi Hollyer
NZSTA Partner Provider

Your Q&A moderator

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Preparing our minds for the session

Whakataka te hau ki te uru

Cease the winds from the west

Whakataka te hau ki te tonga

Cease the winds from the south

Kia mākinakina ki uta

Let the breeze blow over the land

Kia mātaratara ki tai

Let the breeze blow over the ocean

E hī ake ana te atakura

Let the red-tipped dawn come with a
sharpened air

He tio, he huka, he hau hū

A touch of frost, a promise of a glorious
day!

Tīhei mauri ora!

How this session works

- This session covers the key concepts of strategic planning and reporting.
- You can find more information in the workshop resources section of our knowledge hub.
- This icon represents which page you'll find the information on.
- Please use the Q & A function to ask your questions, we'll answer these at the end of the presentation.
- Post-webinar evaluation survey



NZSTA
e tipu e rea

EFFECTIVE GOVERNANCE

STRATEGIC PLANNING AND REPORTING

Learning Outcomes: What does success look like?

By the end of this workshop, you should be able to:

- Rate your school against the characteristics of successful schools and kura
- Explain how governance and management work together when undertaking strategic planning and reporting
- Describe the four stages of the strategic planning and reporting cycle and what your board should be doing at each stage
- Explain what your board should consider when setting your strategic goals and outcomes and how these flow through to your school
- Start preparing for the new Planning and Reporting Framework in 2023
- Identify the key elements of a strategic plan and annual implementation plan

What we'll cover today

- An introduction to strategic planning
- The planning and reporting cycle
- Setting goals that flow through to your school
- The new planning and reporting framework
- Examples
- Questions and answers

What is strategic planning?

“Strategic planning is a systematic process of envisioning a desired future and translating this vision into broadly defined goals or objectives, and a sequence of steps to achieve them.”

source. www.businessdirectory.com/definitions/strategic-planning

Why is it important?

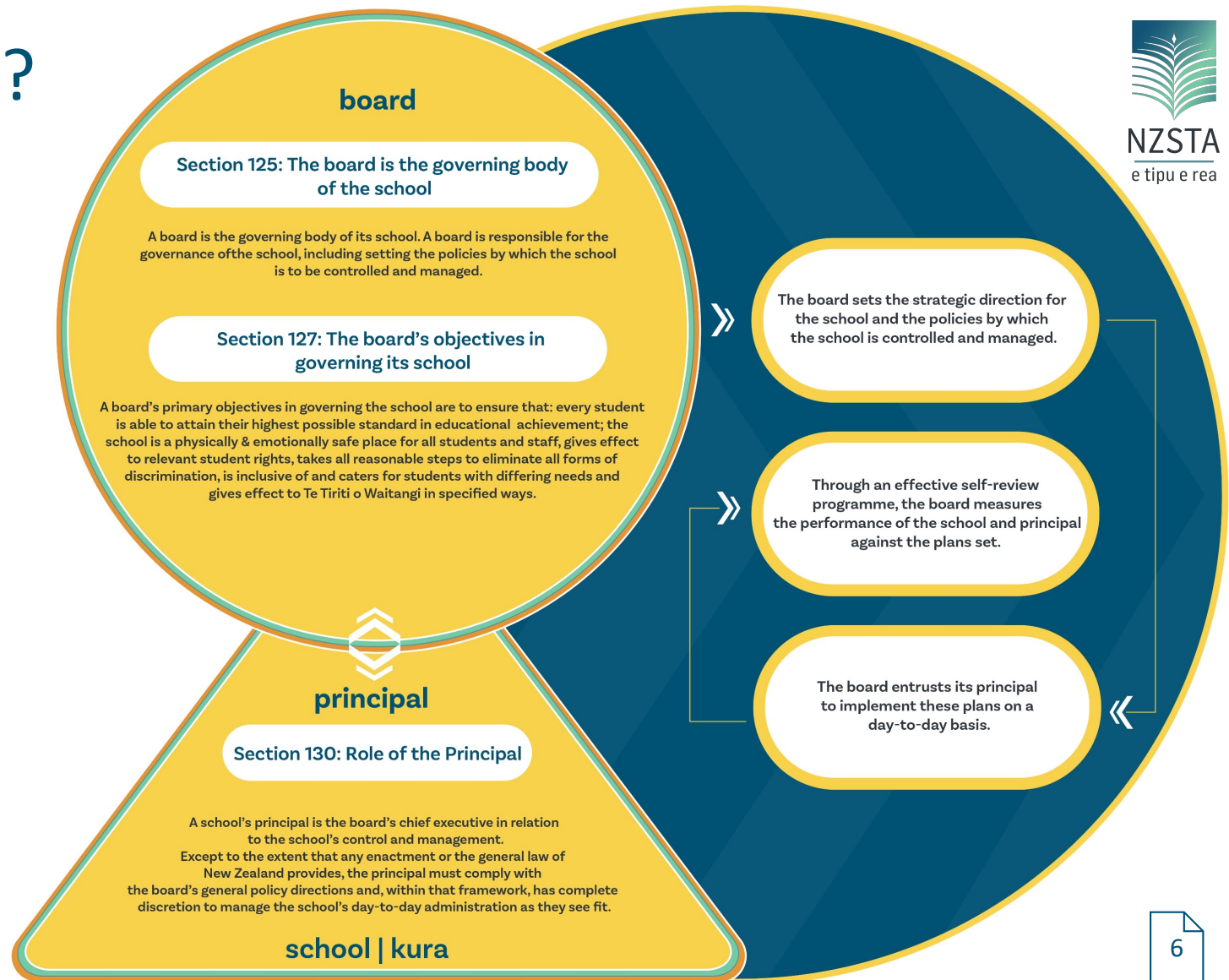
It helps schools and communities work together to establish goals and objectives for their children's futures.

Research shows great schools or kura

- strive for continuous improvement to maximise the success of each student,
- have a strong vision for the future,
- use data and research to analyse their strengths and areas for improvement,
- plan and set targets for the success of all students, and
- account for their impact on student outcomes through regular reporting.

Who does what?

Governance and management working together.



The planning and reporting cycle

A collaborative and continuous process.

- What information do you collect in your planning stage?
- How do you monitor your progress against the goals you set?
- How do you report back to your school community?
- How do you review what was or wasn't achieved in the previous year?



Setting goals - every school is different

Whilst your board has the freedom to set your own goals and priorities these should align with

- your board primary objectives,
- the National Education Learning Priorities (NELP),
- the aspirations, vision and values of your community, and
- your special character - state-integrated or designated character schools

Board primary objectives

Boards have four key objectives

- to ensure that every student at the school can attain their highest possible standard in education achievement,
- to ensure the school is a physically and emotionally safe place for all students and staff,
- to ensure the school is inclusive of, and caters for, students with differing needs, and
- to give effect to Te Tiriti o Waitangi.

NELP - National Education Learning Priorities



1. Ensure places of learning are safe, inclusive, and free from racism, discrimination, and bullying.
2. Have high aspirations for every ākonga (learner), supported by partnerships with their whānau and communities to design and deliver education.
3. Reduce barriers to education for all.
4. Ensure every ākonga gains sound foundation skills, including language, literacy and numeracy.
5. Meaningfully incorporate te reo Māori and tikanga Māori into everyday life.
6. Develop staff to strengthen teaching, leadership, and learner support capability.
7. Collaborate with industries and employers to ensure ākonga have the skills, knowledge, and pathways to succeed in work.

Tips for setting your goals

- Set a small number of goals each year in the areas that you have identified as needing improvement.
- Too many goals will become distracting and compete for resources.
- Goals should be stretch or aspirational and not focused on business-as-usual tasks.
- Goals should be focused on your ākonga and what will best support them to succeed.
- Use the information from your community consultation to help you set your goals.

Consulting your community

- There is no 'right way' to consult your school community – everyone is different!
- Your board should actively seek and genuinely consider the views of your community, incorporating local tikanga Māori, and cultural factors.
- You could use surveys, hui, fono, community meetings, focus groups, interviews, asking for written submissions or a combination of any of these and more!
- This information will help you set goals that best support the engagement, progress, achievement, and wellbeing of all the students at your school.

How goals flow through to your school



The new planning and reporting framework

- The Education and Training Act 2020 is introducing a new planning and reporting framework.
- The Ministry will be undertaking consultation prior to it taking effect on 1 January 2023.
- They will provide more guidance for boards once this is complete.
- While we wait, your board should:
 - continue with your current planning and reporting obligations, and
 - start preparing for the upcoming changes in 2023.

What happens now? 2021 and 2022

- You have a charter (includes your strategic plan and annual implementation plan).
- Your principal develops the annual implementation plan (approved by your board) setting out what progress the school aims to make towards achieving your goals.
- Each year, you'll produce an analysis of variance document which shows the difference between what you achieved and what you planned to achieve.
- Both this and your annually updated charter must be submitted to the MOE by 1 March each year.
- Your annual report (which includes a copy of your analysis of variance and annual financial statements), must be submitted to the MOE by 31 May each year.
- You must also publish your annual report on your school website.

What happens next? 2023 and beyond

The new planning and reporting framework is much simpler and will require your board to prepare:

- a 3-year strategic plan that stays in place for up to three years and sets out how you will achieve your objectives – you'll only need to submit this to the MOE for approval every three years,
- an annual implementation plan with more detail about your board's strategic plan's objectives and targets for each year - you won't need submit this to the MOE, and
- an annual report (that includes your board's statement of variance and annual financial statements) – this will still need to be submitted to the MOE each year and published on your school website.

What should our documents look like?

- Currently, there are no set templates.
- Your board can decide what is the best way for you to capture and present this information.
- The MOE will provide guidance on what information you must include once the consultation process is complete.
- The rule of thumb is to make your documents
 - simple and precise enough to be a living document for your board, and
 - be engaging and easily understood by your community.
- Tip - check out what other schools are doing by looking on their websites.

What your charter includes

Three main sections:

1. an introductory section - a description, history, outline, and key beliefs of your school
2. a strategic section – your strategic goals (high level objectives) and strategic outcomes (the steps that need to be taken each year to achieve your objectives).
3. an annual section - specific targets and planned actions for the coming year (prepared by your principal but approved by your board).

Note: Although your Analysis of Variance is submitted at the same time as your charter it is a separate document which analyses the difference between what you set out to do and what you actually did.

Strategic goals and outcomes example

Our Mission/vision Our school will help each student to attain their educational potential in a safe place, free from discrimination and inclusive and welcoming of all.			
Our Values At our school/kura we value respect, resilience, and readiness to learn.			
Strategic Goal	Year 1 20xx	Year 2 20xx	Year 3 20xx
1. All our students will progress and achieve to their highest possible educational potential through quality teaching and learning, safe environments and positive relationships.	1.1 Curriculum plans are fully developed in consultation with the school's community and review processes of these has begun. 1.2 Staff PLD in writing and reading.	1.1 Curriculum plans are reviewed as per plan cycle. 1.2 Staff PLD in literacy.	1.1 Curriculum plans are fully embedded and part of board self-review. 1.2 Staff PLD as identified by strategic planning.

Annual implementation plan example

Strategic Goal 1: All our students will progress and achieve to their highest possible educational potential through quality teaching and learning, safe environments and positive relationships.

Strategic Outcomes	What	How	Who	By When	Costs	Progress
<p>1.1 Curriculum plans are fully developed in collaboration with the school's community and review processes of these has begun.</p> <p>1.2 Staff PLD in writing and reading.</p>	<p>↑</p> <p>What will be done, by whom and by when to achieve your strategic outcomes</p>	<p>↑</p>	<p>↑</p>	<p>↑</p>	<p>↑</p> <p>Directly informs your budget</p>	<p>↑</p> <p>Item on your board meeting agenda</p>



Drop straight in from your strategic plan with the same numbering

Target groups example

Strategic Goal 1: All students leave school with a minimum NCEA Level 2 or equivalent qualification

Annual Objective: The groups of Year 12 students at risk of not achieving NCEA Level 2 will achieve this or an equivalent qualification.

Target: The 23 Year 12 students that have been identified as not 'on track' to achieving NCEA Level 2 will achieve NCEA Level 2 by the end of the year.

Baseline Data: Using NCEA Level 1 achievement data, including the number of literacy and numeracy credits gained, we have identified a group of students who are at risk of not achieving NCEA Level 2.

Year 12 students (total 23 students)

Boys 15	Girls 8	Māori 8	Pasifika 3
When	What (examples)	Who	Indicators of Progress
Term 1	Develop a learning plan for each target student that details how and when NCEA Level 2 and any remaining NCEA Level 1 literacy/numeracy credits will be achieved.	Year 12 Dean.	Learning plan developed, implemented and adjusted accordingly.

Session summary

- Strategic planning is about picturing where you want the school to be in the long-term and creating a plan to get there.
- It is an ongoing cycle of planning, implementing and monitoring, reporting and reviewing.
- There are no set templates for your documents - make them simple, easy to understand and engaging.
- Your goals should be developed in partnership with your school community and take your board primary objectives and the NELP into consideration.
- A new planning and reporting framework is coming into effect on 1 January 2023 - until then, its as business as usual.
- Contact NZSTA if your board needs help with strategic planning.

Q&A Time!



NZSTA

Karakia

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!

Thank you!

Please contact us for help and support.



Provide us with feedback about tonight
via the post-webinar survey.

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for governance matters

for employment matters