Te Whakangārahu Ngātahi

Planning Together for Ākonga Success:
Our School, Our Community

DRAFT FOR CONSULTATION

Toolkit for Principals/Tumuaki, boards and school staff

Te Mahau

Te Tāhuhu o
te Mātauranga
Ministry of Education

Te Whakangārahu Ngātahi

Planning Together for Ākonga Success: Our School, Our Community

What does the name represent?

The work around changes to school/kura planning and reporting has been given the name Te Whakangārahu Ngātahi, which represents schools/kura working together with their communities.

The English sub-name is Planning together for ākonga success: Our School, Our Community ('Planning Together' for short).

This name puts ākonga at the forefront and emphasises that planning should be a collaborative activity.

It is not something that a school/kura should decide for their communities, but instead decisions on priorities in schools/kura should be made with their school community.

Why is school planning and reporting so important?

Te Whakangārahu Ngātahi aims to improve planning and reporting practices, to focus on delivering equitable and excellent outcomes for all ākonga, by having schools/kura be more accountable and responsive to the needs of the community.

Effective planning and reporting underpins all the other work that schools/kura do. Schools/kura need to intentionally plan, and evaluate their performance to:

» give effect to Te Tiriti o Waitangi

» meet legislated board primary objectives and show how the school/kura has regard for the NELP

» ensure the needs of all ākonga are met

» ensure the voices of all ākonga and whānau are heard

» develop and implement teaching and learning programmes that give effect to curriculum requirements, and

» implement teaching and learning programmes, that give effect to the New Zealand Curriculum or Te Marautanga o Aotearoa, to improve outcomes for all ākonga.

What's inside this toolkit?

What will be different?

Changes and benefits of Te Whakangārahu Ngātahi

What are the changes?

In January 2023, new legislation for planning and reporting came into effect. This means:

» Strategic Plans and Annual Implementation Plans replace school charters.

» School boards must consult with their communities when developing their strategic plans.

» All planning and reporting documentation will have to be published online so the community can access these easily.

New Strategic Plans need to be ready by 1 January 2024. A kura/school's most recent charter has now rolled over into 2023, with a requirement for the annual section of their charter to be updated by 31 March 2023.

What's different?

Schools/kura are now legally required to consult with their community so that ākonga, whānau, hapū, iwi, and others can be involved in the school/kura planning process.

Many schools/kura may do this already. For other schools/kura, this may be new or a shift in practice, and they may require guidance or support at varying levels.

What will the changes help schools/kura, and their boards to do?

» Schools/kura can regularly collaborate with their community to develop strategic plans, annual implementation plans and annual reports.

» Schools/kura can proactively and effectively engage their community throughout the entire planning process, from getting input to sharing findings to developing plans.

» Boards and Principals/Tumuaki are aware of their responsibilities, understand the benefits of these changes, and can describe changes they may need to make.

» Schools/kura, and their boards, should feel well-supported by government and sector partners to engage and work with whānau and communities more effectively.

English medium and dual medium schools/kura

These supports have been designed for English medium, and dual medium schools. Material for affiliated and unaffiliated Maori medium kura is being developed separately.

Te Whakangārahu Ngātahi is intended to enable schools/kura to:

» be good Te Tiriti o Waitangi partners

» prioritise actions to achieve equitable outcomes for ākonga through an inclusive process and delivering excellent curriculum

» build partnerships with their community

» build trust through a transparent process

» continuously improve to meet goals, and

» adapt to their communities' changing needs.

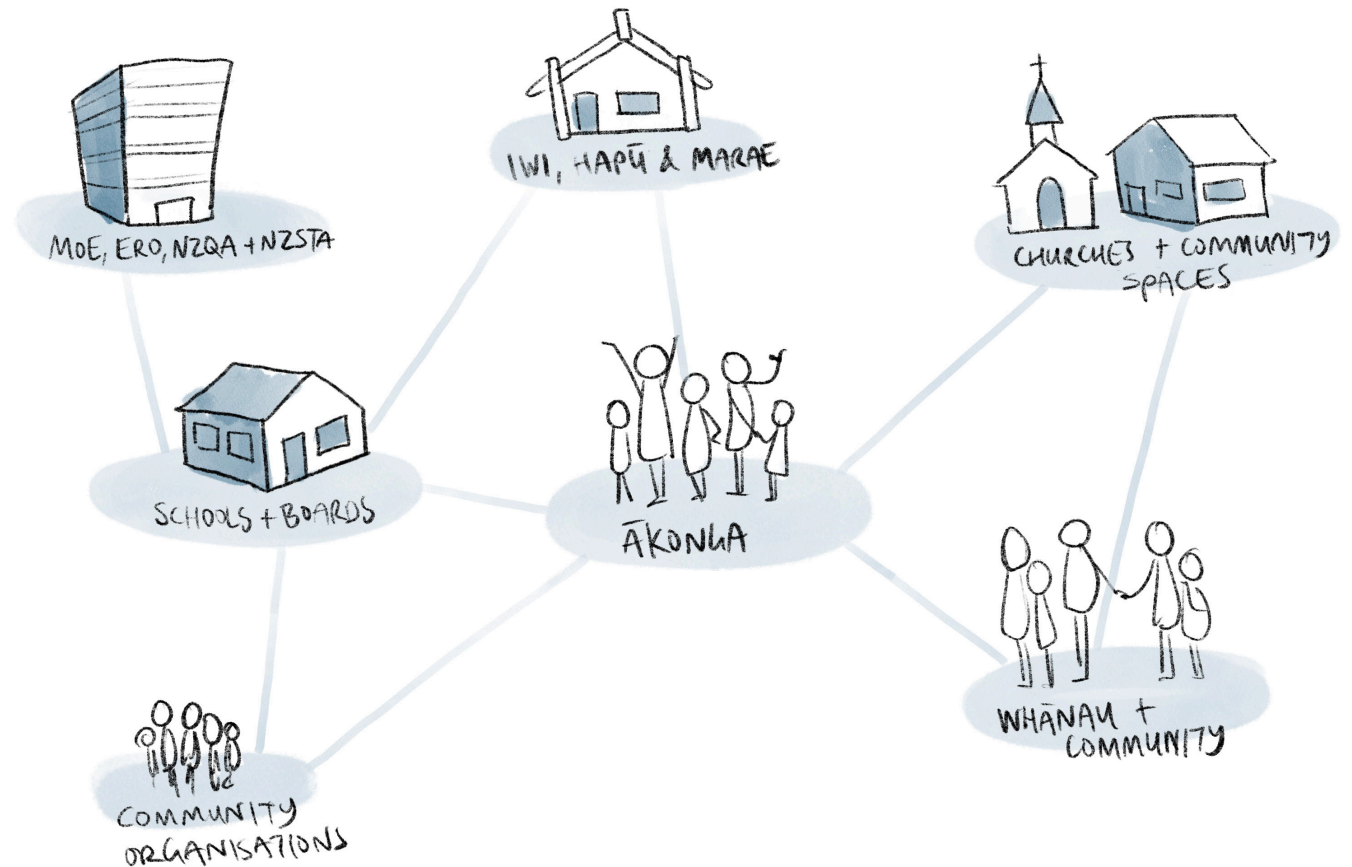DRAFT FOR CONSULTATION

Schools/kura are part of the community

Creating, strengthening, and evolving connections

Schools/kura are part of a community network.

All members of this network can contribute to the success of our ākonga.

Stories of good practice

Where has effective engagement strengthened board planning processes?

Example 1

Example 2

Example 3

1 [Placeholder]

During sector and community workshops the project team hope to uncover examples of good practice that can be shared in future versions.
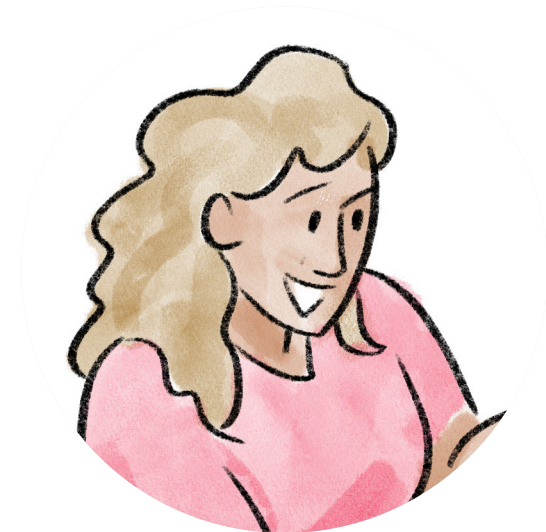
2 [Placeholder]

3 [Placeholder]

How does Te Whakangārahu Ngātahi work?

Process on a page

The stages of Te Whakangārahu Ngātahi are informed by various approaches, such as having an inquiry approach; a continuous improvement mindset; a focus on school/kura improvement for equity and excellence; and developmental evaluation.

1 Prepare for planning

Before you begin any planning:

» Understand how to give effect to Te Tiriti o Waitangi.

» Know the legislative and reporting requirements that guide schools/kura.

» Ensure that boards and Principals/Tumuaki understand changes related to Te Whakangārahu Ngātahi.

» Review outcomes from your school's internal evaluation and work undertaken with ERO Evaluation Partners.

2 Understand who is in your community

Strategic planning

Gather information that helps you understand and prepare for community engagement e.g. through community census data.

Identify the communities we should prioritise. This could include those that aren't present, participating or progressing to their potential.

Identify representatives in the school/kura and community you could work with.

Identify local marae, hapū, and iwi and understand their history.

Annual planning

Review how relevant and up to date information previously gathered is. Update as necessary.

3 Engage with your community

Strategic planning

Identify the most appropriate ways to engage with different members of your community. This might include:

» Ākonga

» Parents and whānau

» Hapū and iwi

» School staff

» Other community groups/ interests, e.g. special character representatives, business groups.

Carry out targeted and general forms of engagement with ākonga, whānau and community to understand their needs, aspirations, and what matters to them.

Annual planning

Continue to listen to your community about their needs and aspirations, focussing on any changes.

4 Set your school/ kura direction

Strategic planning

Make sense of information heard from your community, and information you have gathered on student progress and achievement, attendance and engagement and your internal evaluation priorities.

Check your understanding of preferred priorities by sharing with your community..

Set the direction (goals, values and measures) and decide when things will happen.

Capture in a way that best suits your school/kura and can be shared with your community.

Refine with your community as many times as necessary.

Annual planning

Draft the Annual Implementation Plan based on the Strategic Plan and the previous year's progress.

Reassess and confirm when things will happen.

Check back with your community as often as necessary.

5 Share your plans

Strategic planning

» By 1 March, publish your Strategic Plan on a website.

» Share with your community, the Ministry and your ERO Evaluation Partner.

Annual planning

By 31 March, Publish your Annual Implementation Plan on a website.

Share with your community.

6 Deliver and improve

Annual planning

Appropriately resource the improvement actions identified in the plans.

Implement your annual plan to make the improvements.

7 Reflect on progress

Annual planning

Regularly reflect on, review, and assess your progress throughout the year.

Share progress with your community and offer opportunities for feedback.

Evaluate the outcomes achieved each year.

Report against key milestones to the community and the Ministry and share with your ERO Evaluation Partner.

By 31 May of each year publish your Annual Report (including Statement of Varience) on a website and submit to the Ministry, and share with your ERO Evaluation Partner

Toolkit

(Nearly) everything you need to plan
effectively with your school/kura community

1. Prepare for planning

Ensuring schools/kura have effective governance and that boards and principals/tumuaki understand their responsibilities. Gather and understand information that you will need for the planning process

How might this be done

» Refer to NZSTA's resources to learn about giving effect to Te Tiriti and how it relates to the effective running of a school.

» Read and understand the relevant regulation and legislation.

» Read and understand the National Education and Learning Priorities (NELP).

» Understand Te Whakangārahu Ngātahi, and identify the changes to your practices and process, and determine what you are doing well and what you can improve on.

» Gather and understand information in previous year's Annual Report (including Statement of Varience), student progress and achievement data, attendance and engagement data, and the findings from your latest collaborative evaluation with ERO.

» Work with your ERO Evaluation Partner to evaluate and assess how well you have achieved your previous strategic goals to surface key priorities for improvement.

» Ask yourself:

› Do we know what effective planning looks like?

› Do we have effective reporting to the board?

› Do we understand Te Mātaiaho, the refreshed English-medium National Curriculum and what it will take to implement?

› Do we understand Te Tamaiti Hei Raukura framework for Te Marautanga o Aotearoa?

› Do we have a process in place to ensure we keep up to date with the new curriculum as it is released?

1. Prepare for planning

Annual planning actions:

» Figure out where you are on your Te Tiriti o Waitangi journey and determine your next steps.

» Know the new planning and reporting regulations and requirements that guide you.

» Ensure that boards and principals/tumuaki understand Te Whakangārahu Ngātahi.

Resources

» [NZSTA Te Tiriti O Waitangi and School Governance](#)

» [NZSTA Board Tools and Support](#)

» [NELP Thinking Tools](#)

» Curriculum tools - localised curriculum, assessment for learning, whānau engagement (https://curriculumrefresh.education.govt.nz/support-schools-leaders-and-teachers and https://curriculumtool.education.govt.nz/)

» [Te Mātaiaho Impementation supports](#)

» [ERO's School Improvement Framework](#)

» [ERO's Te Ara Huarua Evaluating for Improvement Framework.](#)

Education and Training Act 2020
Changes to planning and reporting

Summary of changes

» Move from charters with an annually updated section to three-year Strategic Plans with a separate Annual Implementation Plan.

» Strategic Plans must provide strategies for boards to achieve, or work towards achieving, their primary objectives and for meeting community preferences and priorities.

» Move from no consultation required on charters to full consultation with school communities in the development of Strategic Plans.

» There is no change to financial reporting.

» Annual reports must now include a report on student progress and achievement and a report on how the school has given effect to Te Tiriti o Waitangi

» Regulations to provide the detailed requirements.

Regulations on Strategic Plans

Content to be included

» The school's vision

» Strategic goals for meeting its primary objectives.

» Other goals identified through consultation, and how they prioritised those goals.

» Strategies for identifying and catering for learners whose needs have not yet been well met.

» Strategies for giving effect to the board's Te Tiriti o Waitangi obligations.

» Measures, evidence and processes to evaluate their progress.

» Information on how strategic goals are linked with national education plans.

Accessibility

» Must written and presented to be accessible to their communities.

Consultation

» Must consult with the school's community, including Māori.

Timing

» The first strategic plan must be prepared by 1 January 2024.

» Must be published and submitted to the Secretary by 1 March.

Regulations on Annual Implementation Plans

Content

» Information about the previous year's performance.

» Information on how previous year's unachieved targets will be addressed.

» Annual targets for each strategic goal.

» Actions to meet annual targets.

» Allocation of resources.

» Measures and evidence to evaluate progress.

» Teaching and learning programmes and strategies especially for at-risk learners – eg, those who have been underserved to date.

» How targets and actions will support Te Tiriti o Waitangi obligations.

Consultation

» Not required (ETA)

Timing

Annual implementation plan must be prepared and published each year by 31 March.

Regulations on Annual Reports including Statements of Variance

Annual reports must be written and presented so they are easily understood

Annual reports must include:

» Financial statements – some Education Act 1989 requirements are now in regulations – section 87 (3)

» A report on the school's student progress and achievement

» A report on how the school has given effect to Te Tiriti/The Treaty

Statements of variance must describe:

» Actions the board took to achieve its targets for the past year

» Outcomes of the board's actions and information used

» Reasons for any differences between performance and targets

» How the differences will inform the following year's planning

How will regulations be tailored to iwi and hapū affiliated kura?

What kura are we talking about?

Kura affiliated with Te Rūnanga Nui o Ngā Kura Kaupapa Māori (TRN), Ngā Kura ā Iwi o Aotearoa (NKAI), and other iwi and hapū affiliated kura.

Why apply regulations differently for them?

Because they have different statutory obligations:

» TRN affiliated kura must apply Te Aho Matua.

» NKAI and other iwi and hapū must comply with their special designations.

It recognises the mana of their foundational documents.

It does not make sense to require these kura to show they are complying with Te Tiriti o Waitangi.

Different application for Strategic Plans

May develop their strategic goals that reflect Te Aho Matua and local tikanga respectively.

Don't have to set out full strategies on Te Tiriti o Waitangi — instead can provide a general statement.

Different application for Annual Implementation Plans

Don't have to set out a full description of how targets and actions give effect to Te Tiriti o Waitangi — instead can provide a general description.

Checklist: preparing for planning

We have:

☐ Determined where we are on our Te Tiriti o Waitangi journey and what our next steps are, including where or who to go to for help.

☐ Understood the new planning and reporting regulations.

☐ Understood the planning and reporting practices and processes described in this guide, and know where our current process needs to be adapted.

☐ Collaborated with ERO Evaluation Partner to evaluate progress against previous goals to determine key priorities for action.

2. Understand who is in your community

Understand who is part of your school community and what you know about these whānau and communities.

Identify who in your school/kura community needs more support.

Identify trusted representatives within the school and community.

Assess the strength of your existing relationships.

Resources

- » [NZ Stats website](#)
- » Self-reflection tool
- » [NZSTA Knowledge Hub](#)
- » Local Iwi Education Plan
- » Educationally Powerful Connections with Parents and Whānau (ERO, 2015)
- » Building Genuine Learning Partnerships with Parents (ERO, 2018)

How might this be done

- » Refer to community census data.
- » Refer to ākonga progress and achievement and wellbeing data.
- » Reflect on the state of any existing relationships with community groups and representatives, and where there may be gaps, and why, and how this might be addressed..
- » Reflect on what your relationship is with local marae, hapū and iwi? Is this a meaningful, reciprocal relationship? How could this be strengthened?

What you might make

- » Comprehensive lists of community groups to engage with.
- » Lists of ākonga, whānau, and community members to specifically reach out to.
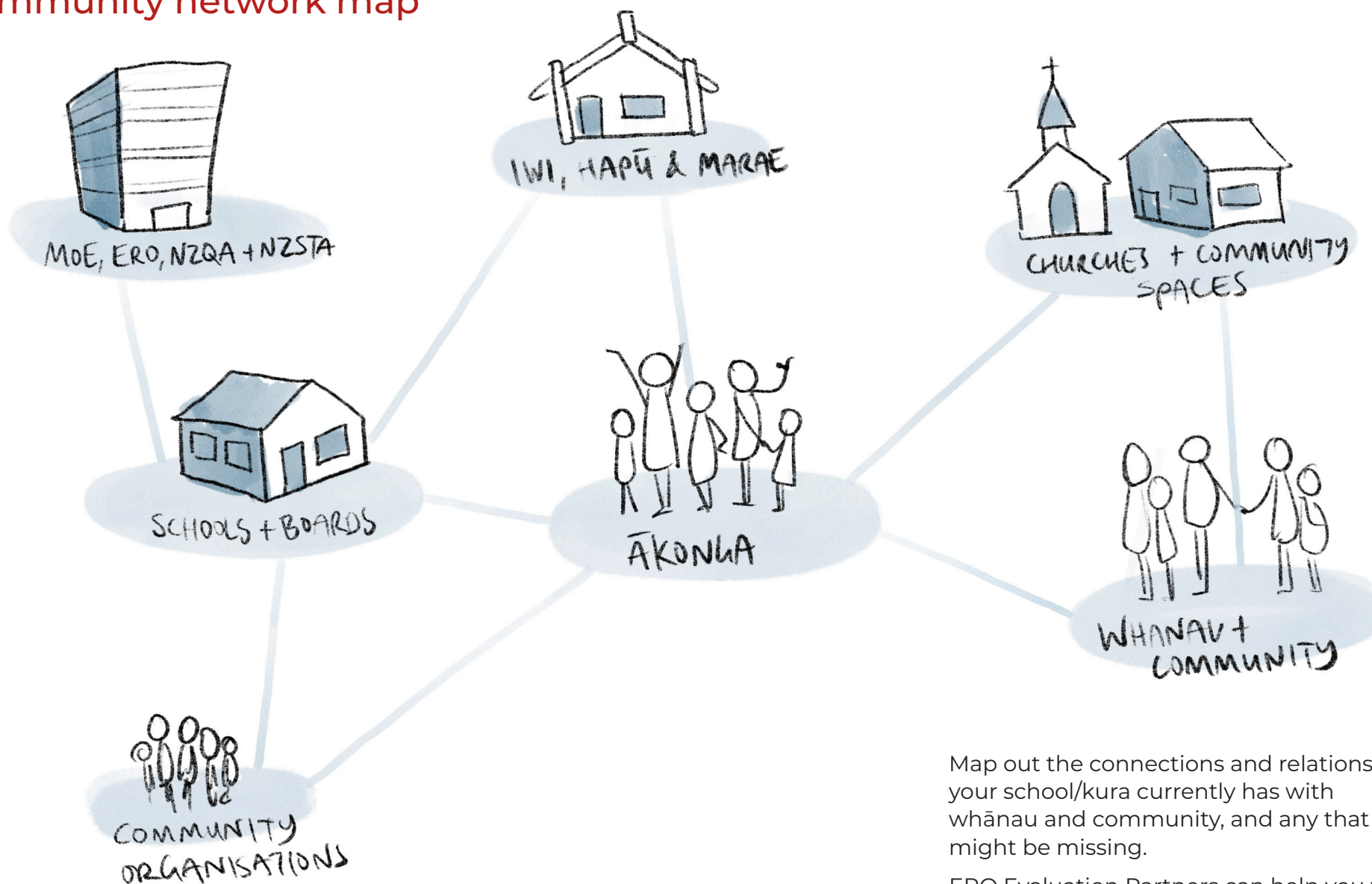- » Summary of who is in your community.

Strategic planning actions

- » Gather available information that helps us understand and better prepare for community engagement e.g. through community census data.
- » Identify the communities we should prioritise. This could include those that aren't present, participating or progressing to their potential.
- » Identify who in the school and community we can work with.
- » Identify local marae, hapū and iwi.

Annual planning actions

- » Review how relevant and up to date information previously gathered is and update as necessary.

Community network map

MOE, ERO, NZQA + NZSTA

IWI, HAPŪ & MARAE

CHURCHES + COMMUNITY SPACES

SCHOOLS + BOARDS

ĀKONGA

WHANAU + COMMUNITY

COMMUNITY ORGANISATIONS

Map out the connections and relationships your school/kura currently has with whānau and community, and any that might be missing.

ERO Evaluation Partners can help you with this as part of the Te Ara Huarau evaluation process.

Self-reflection guidance

For Principals/Tumuaki and Boards, part of understanding your community is understanding yourself, your role within the community, and how the way you see the world might influence your engagement approach. When self-reflecting, you might like to consider your personal attributes, such as:

» age	» education	» family
» ethnicity	» experiences	» preferences.
» gender	» beliefs	

How might your attributes differ from others – your staff, ākonga, whānau, and communities?

Prior to engaging you may also want to ask:

» What are some of the major factors that have shaped who you are?

» How might these factors influence how you approach engaging and working with your community?

» What are some strategies you could use to minimise any potential biases that may arise?

After you have begun, or have completed engagements you may want to ask:

» Has anything challenged your initial assumptions about what you expected to hear, or surprised you in any way? If nothing has surprised you or you feel like nothing new has been learned you may want to ask why.

Identifying who needs to be prioritised in your school/kura community

We are intentionally applying a broad definition for who needs to be prioritised because this needs to be considered in the context of your school/kura.

Depending on your school/kura, this could include those that aren't present, participating or progressing to their potential.

There are some questions you may wish to ask to help you begin to define this for your school/kura:

» Who is not progressing and achieving at the level we might expect, and why?

» What health or wellbeing factors should we take into account?

» Who do we always hear from, and who do we rarely hear from? How can we connect better?

» How does the group of people who regularly engage differ to the overall makeup of our school/kura community?

» How accessible is the information we provide to whānau and community? Is it plainly and clearly written, and do we need to consider communicating in multiple languages? How might the way we provide information impact the opportunity for whānau or community to engage?

» How will we engage with members of the community we rarely hear from?

» Are there other mediums of communication that would work better for our communities?

Checklist for understanding your community

We have:

☐ Gathered information about who is in our school community from multiple sources.

☐ Identified ākonga, and/or whānau, and/or communities who should be prioritised or are under-represented, and we have considered a range of progress and achievement, wellbeing, and other information when making this determination.

☐ Taken time to self-reflect and understand what assumptions we may bring into this process because of our own world views.

☐ Understood who we do, or do not, currently have relationships with in our school community.

☐ Examined and understood the strength of our relationships with others in the community and know who we can reach out to for help when we begin to engage.

3. Engage with your community

Proactively and intentionally engage with your school/kura community to understand their needs and wants.

How might this be done

» Talk to whānau, hapū, iwi, Kāhui Ako, community representatives and groups to:

› know what engagement methods are best for your school community.

› determine where working with representatives would be most appropriate.

» Set up a repository system for information gathered.

» Write up your engagement questions.

» Share evaluation findings with your community to start the conversation on priorities for your school.

What you might make

» An engagement plan including:

› methods of engaging with all the different groups in your school community, especially the under-served and under-represented groups.

› the questions you want to ask them.

» A repository system that all staff can access and add information about what the community has shared.

3. Engage with your community

Strategic planning actions

» Identify the most appropriate ways to engage with all your community. This might include, ākonga, parents and whānau, hapū and iwi, staff and other community groups/interests, e.g. special character representatives, business groups.

» Carry out targeted and general forms of engagement with the community to listen to, and understand their needs, aspirations, and what matters to them.

Annual planning actions

» Continue to listen to your community about their needs and aspirations, focussing on any changes.

Resources

» Use the tools on the following pages:

› What you should consider when engaging with your community

› How to set up a repository

› Example engagement methods

› Sample questions

How can you engage with all your community?

To ensure excellent outcomes for all ākonga, the voices and needs of the whole school/kura community should be heard by schools, especially the voices not often heard, or who are part of priority groups.

Engaging through representatives

Schools/kura don't always have to engage directly with whānau and communities. There may be representatives or groups in the community that whānau already trust, and who might be able to speak to schools on behalf of whānau. Schools/kura might be able to work in partnership with these groups to ensure they are hearing from the whole community.

Benefits

» Relationships and trust already established.

» Creating more opportunities for people to provide input.

» Making use of conversations or established processes that may already be happening.

» Allowing whānau and communities to work in ways most comfortable to them.

» Reduces the amount of work for schools (without offloading responsibility).

Targeted community engagements

Once you understand which ākonga, whānau, or community are priority groups, you can make a concentrated effort to connect with them.

This could be through school staff (principal/tumuaki, teachers, etc.) meeting with ākonga and whānau, working with representatives, or using technology to reach out.

It is vital that you carry out targeted community engagements to ensure that your school planning is inclusive of all voices to improve outcomes for all ākonga.

Benefits

» Ensures all voices are proactively invited to participate.

» Works towards improving outcomes for all ākonga by taking an inclusive approach.

» Allowing whānau and communities to work in ways most comfortable to them.

General community engagements

Schools/kura should ensure that as many members of their community have the chance to be involved as possible. The specific methods used to engage will vary between schools/kura, but should be relevant for that community. This could mean using existing events, information-sharing tools such as school apps, newsletters, or expanding the kind of in-person, online, or digital methods being used.

Benefits

» Ensuring schools/kura reach as much of the community as possible.

» Allowing whānau and communities to work in ways most comfortable to them.

Create meaningful opportunities for whānau and community to engage

1 Time

Hold meetings when those who are under-served or under-represented can take part.

Consider breakfasts, after hours or on weekends, and think about how much time you ask for.

2 Place

Go to the places where whānau and community feel most comfortable. Consider marae if appropriate, or alternative community spaces such as sports clubs or churches.

3 Cultural safety

Create safe spaces for conversations by honouring tikanga and other customs appropriate to the groups you're working with, and the place where you are working.

4 Connect through others

Connect with key family members or community champions.

Trusted relationships may already be established — do you know who holds these?

5 Ask better questions

Asking interesting and appropriate questions that speak to whānau and community experiences and aspirations will yield better information (rather than jumping straight into strategy, planning and reporting jargon).

6 Reciprocity

Highlight that this process is a conversation.

Explain how the information that is shared will be used and describe how whānau and community involvement will benefit ākonga.

Explain when and how you will report back, including opportunities for review and revision.

Do what you say you will in your plan.

7 Language support

Plan for conversations to be in languages other than English.

Identify and work with staff members or community champions, or reach out to Te Mahau for help to allow this to happen.

8 Respect the history

Show you have done your homework before engaging by making sure you are aware of the history and any current issues in your community, such as any claims to the Waitangi Tribunal, for example.

Look after the contributions of your community

It's vitally important to act as guardians of the information that is shared with you. Ākonga, whānau, and communities may entrust you with personal stories and expect you to take care with this information. Their stories and experiences are not yours, you are merely looking after them for a time.

This is a short, non-exhaustive list of what to think about when gathering relevant information to inform strategic planning, annual planning, and reporting.

» Structure information from the start so it will be easier to make sense of later on.

» Link community input to key questions, topics, or existing plans or goals for example.

» Be considerate of the privacy of individuals. Know which staff have access to what, and what controls each person has.

» Have rules about identification of participants. Will you use names of individuals, family names, or no identifiers?

» Have rules about when information will be deleted.

You may have systems in place already that help you to look after data and information appropriately. Use these to your advantage. Be sure to keep any commitments made to participants.

Resources

[Ministry of Education guidance on school records](#)

[NZSTA Privacy Act guidance](#)

Example methods for engaging with communities

There are many legitimate ways for a school/kura to engage with whānau and community.

Which of these potential methods or moments might be best for gathering information related to strategic planning for your school/kura?

Remember, there will be more than one!

Targeted methods

» Provide several options for time/date/format for hui.

» Talk via SMS or messaging apps to individuals or small groups.

» Provide written material in different languages as appropriate for the group.

» Facebook posts or polls for specific groups.

» Send out a newsletter to particular whānau and communities.

» Hui (focus groups, whānau hui).

» include community representation in your evaluation alongside ERO

Engaging through others

» Ask Parent Teacher Association or 'Friends of the School' groups to gather information.

» Tap into online whānau or community groups.

» Connect with local marae, hapū or iwi.

» Reach out to local sports clubs, churches, etc. where ākonga, whānau and communities are members.

General/broad methods

» Anonymous suggestion box.

» Hard copy questionnaires.

» Short polls or questionnaires using online tools such as Survey Monkey.

» School or community events.

» Local sports games or events.

» Discussions at school gate.

» Hui (focus groups, whānau hui).

» Parent/teacher meetings.

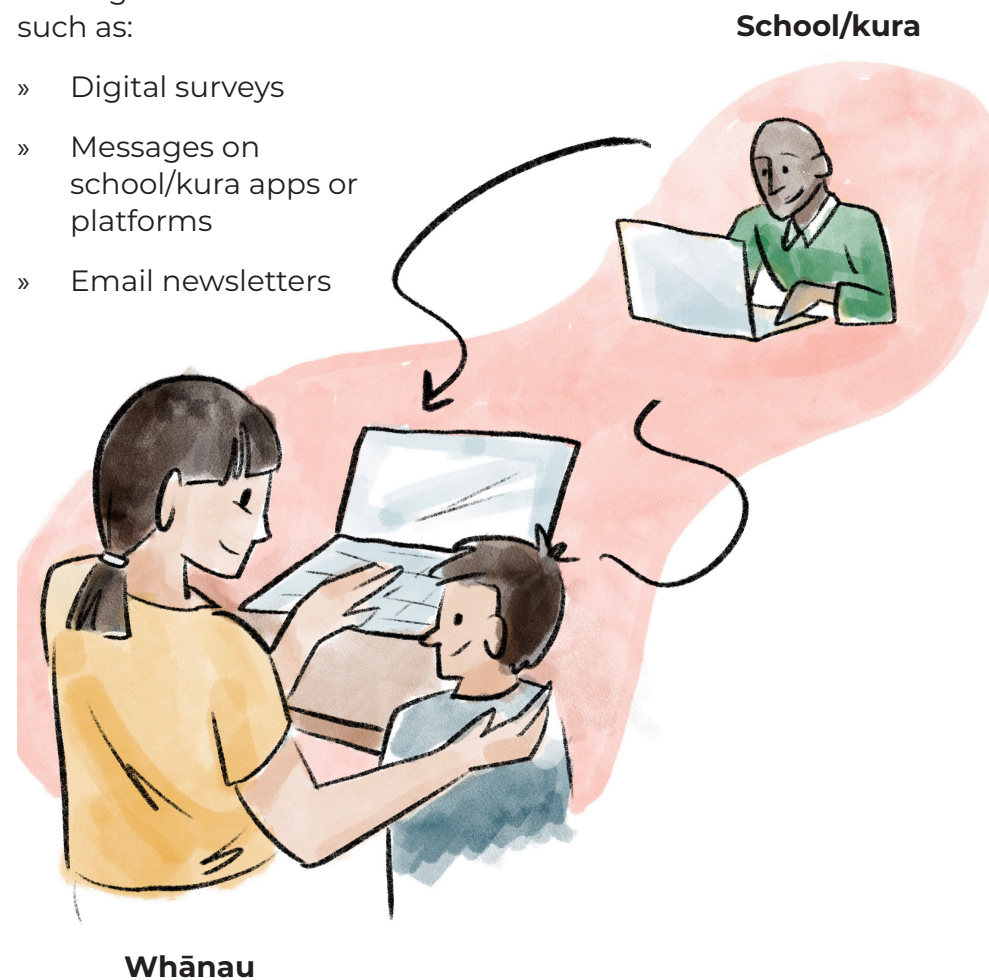» Social media posts.

Engaging at the school/kura gate

Kōrero at the school/kura gate, and documenting afterwards.

Engaging through digital interaction

Use digital channels such as:

» Digital surveys

» Messages on school/kura apps or platforms

» Email newsletters

School/kura

Whānau

Engaging at parent teacher interviews

Kōrero and pātai at more formal learning conferences, learning conversations, or whānau hui.

Engaging at community events

Find opportunities to engage at school/kura events, having informal conversations, or provide hard-copy forms.

Engaging through others

Connect with local marae, hapū or iwi.

Reach out to sports clubs, churches, or cultural associations.
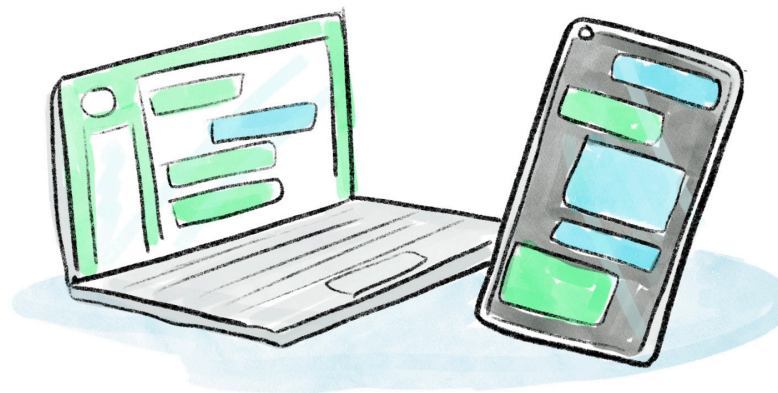
Reach out through online chat, messaging apps, or social media. Some people find safety in an online, group setting.

Ask to be involved in pre-existing events, such as PTA meetings to hear what is being said.

Sample questions for a school/kura engaging with communities

Learning about ākonga experiences

» How well do we cater to the diverse needs of our ākonga?

» How well do we cater for ākonga with additional learning needs?

» What does your child like about their school/kura?

» What enhances the mana of your child?

» What diminishes the mana of your child?

» What does your child look forward to at their school/kura?

» What does your child dislike about their school/kura?

» What do we do well as a school/kura?

» How do you help your child to learn things?

» What outcomes do you want for your child?"

» Does what your child is learning about and how they are learning meet your child's needs?

Learning about community experiences

» What enhances the mana of the community?

» What diminishes the mana of the community?

» What do we do currently that encourages ākonga to attend?

» What do we do currently that discourages ākonga from attending?

» How do you prefer to be consulted (with?) on important issues?

» What do we do currently that causes ākonga to be disengaged?

» What are the key skills you expect young people to gain from school/kura?

» What areas do we need to improve (on?)?

» What could we do better to engage ākonga?

» What could you do to help ākonga attend regularly?

Sample questions for a school/kura engaging with ākonga

Ākonga have an important role to play in the strategic direction of schools/kura and it is important their voices are heard and honoured.

How might the information gathered through asking questions of ākonga help inform strategic planning?

» What do you like about your school/kura?

» What don't you like about your school/kura?

» What makes you feel safe?

» What makes you feel unsafe?

» How do you like learning?

» What do you like learning about?

» What helps you learn?

» If you were the principal or on the school board, what would you do or change to make your school/kura better?

» Is your culture valued/celebrated at school/kura?

» Do you like being at school/kura?

Resource

Best practice guidelines around engaging with children and young people can be found in the Child and Youth Wellbeing Strategy.

Education Now (ERO) for students, parents, teachers, boards

Checklist for engaging with your community

We have:

☐ Described to whānau and community how information they provide will be used.

☐ Observed and adhered to tikanga or other appropriate customs during engagements.

☐ Responded to and reflected the needs and aspirations of Māori in our community engagements.

☐ Responded to and reflected the needs and aspirations of our under-served and/or under-represented ākonga, and/or whānau, and/or communities when planning and running engagements.

☐ Responded to and reflected the needs and aspirations of relevant groups if we are a designated character or specialist school in our community engagements.

☐ Determined if we have not been able to work with a particular group, and have a plan to remedy this – or, are adjusting our schedule to allow more engagement to happen.

☐ Stored information provided by ākonga, whānau, and communities appropriately and in line with privacy considerations and other commitments you have made.

4. Set your school/kura direction

Make sense of what you have heard, determining the future direction of your school/kura and validating with your community. Put your evaluative practice into place.

How might this be done

» Determine specific strategies and plans to improve outcomes for the priority groups that you've identified.

» Identify goals and determine how these can be resourced and achieved and work out an order of priority for each.

» Define your signs of progress – how you'll know that you're on the right track while working towards long-term goals.

What you'll make

» A Strategic Plan.

» An Annual Implementation Plan.

» A schedule for when you'll check in and report back to your community.

» A set of goals, measures, and signs of progress to give you confidence you're heading in the right direction.

Resources

» [ERO Te Ara Huarau](#)

» Strategic plan template

» Annual implementation plan template

Strategic planning actions

» Make sense what your community has told you about their needs, aspirations, and what matters to them.

» Check this information is accurate by sharing what you heard back with your community.

» Set the direction (goals, values and measures) and decide when things will happen.

» Capture in a way that best suits your school/kura and can be shared with your community.

» Refine with your community as many times as necessary.

Annual planning actions

» Draft the Annual Implementation Plan based on the Strategic Plan and the previous year's progress.

» Reassess and confirm when things will happen.

» Check back with your community as often as necessary.

Making sense of what you hear, what you see, and information you have collected

The prospect of making sense of a large amount of information may be daunting but with some forward planning and careful thought it doesn't need to be.

» Be sure to set up a structured way to store information before you begin (see 'Gathering good information').

» Refer to your structure throughout the sense-making or analysis process, using your guiding questions, topic areas, or previous aims/objectives to create themes.

» Look out for themes that are being frequently repeated.

» Take note of points of view that go against the grain.

» Be aware of your own biases and how they might influence your point of view when reviewing feedback.

» Consider specifically what you have learned from priority groups and keep this information separate, don't lump it all together.

» Verbatim quotes from ākonga, whānau, or community can help bring your analysis to life. Use these with care and with permission.

» Work with your ERO Evaluation Partner to assess what your community wants to prioritise alongside what your staff and school data shows that you need to prioritise.

What is a Strategic Plan?

Strategic plans don't need to be complicated.

Strategic planning is about thinking long-term, setting desirable and effective goals and making concerted effort to achieve these over time.

Don't over-estimate what can be done in the short-term, and at the same time don't under-estimate what can be achieved in the long-term with good planning and the support of an engaged community.

Strategic plans need a few key things:

» to be coherent, e.g. they may have a core narrative, vision, or kaupapa that everything else hangs off

» to have aspirational aims (or objectives), which should be defined with the community

» to have goals that help you to focus and make progress on achieving your aims, and

» to have a way of measuring progress annually and longer term.

Tips:

It is important to note that context is everything. What works for one school/kura may not work for another, so be careful of 'paint by numbers' or templated approaches. We have provided an initial template in this pack (we will be producing alternate versions soon). This is intended as a starting point for you to build from in a way that is relevant for your school/kura, and your ākonga, whānau, and community.

Strategic plans don't need to be full of jargon. Keep the language accessible and understandable so that *all* ākonga, whānau, and community members can engage.

What is an Annual Implementation Plan?

Annual Implementation Plans can help you to make consistent progress towards your goals, by breaking down the work into smaller, time-bound, and achievable chunks.

Annual Implementation Plans should be adaptable based on previous year's performance, contextual or environmental factors (e.g. COVID, significant weather events), and changes to who is part of your school/kura community.

You should also define ways of understanding or measuring progress in a similar way to Strategic Plans, but on an annual basis.

Signs of progress and measurement

As well as achieving our goals, we want to know the impact we have had and the benefits our actions have created for ākonga, whānau, and community.

Monitoring signs of progress are a way to get a sense that you are heading in the right direction. To do this you might ask: what changes or behaviours will you begin to see that can indicate progress?

Determining signs of progress can create a sense of positivity when goals seem far away or hard to achieve and allows you to celebrate small improvements over time.

Consider:

» what your signs of progress might be

» how you'll measure yourself, and set targets

» using some quantitative measures (metrics, e.g. attendance, progress and achievement against standards)

» using some qualitative measures (experiences, feelings, wellbeing outcomes)

» who needs to change? or, what part of our school/kura system or network needs to change?

» engaging in ongoing internal evaluation to get into the mode of continuous improvement.

Strategic plan template

Note: *This is an early prototype developed through a limited design sprint in order to demonstrate what good planning and reporting **could** look like. This is for an English-medium schooling context only and will need to go through a full robust testing and co-design process to further develop it into a usable tool for schools. This will include ensuring a bilingual, inclusive and Te Tiriti focused approach is taken. A separate workstream will be undertaken to develop supports for Māori-medium kura.*

Our 3 Year Strategic Plan — 2023 to 2025

Name of school:

....

Vision statement: (An inspirational statement of a desired future for your school. See our guide to Creating a Vision Statement.)

What we heard: (Express the voice of the community work you've done in a way that relates to the agreed objectives.)

Objectives & Strategic Goals: Objectives are broad statements of direction that enable you to successfully achieve your vision. These must include your 4 primary objectives as set out in legislation. We suggest 4-6 Objectives with corresponding Strategic Goals for each Objective. You may have more if you and your community so desire.

Strategic Goals are achievable strategies that help you to work towards your Objective. You can have as many strategic goals as you need.

Objective 1:
"Each of our ākonga in our kura will achieve to their highest possible level." (Primary Objective 1 and Section 164)

Strategic Goal 1:
(Example only) To enable our teachers to be confident in using latest, evidence-based practice to lift progress and achievement of every ākonga, with a particular emphasis on te reo matatini and pāngarou/literacy and numeracy. (NELP Priority 4 & 6)

Strategic Goal 2:
(Example only) To enable our curriculum to provide integrated learning opportunities that meet every ākonga needs and connects them to this place and community (NELP Priority 2 & 3)

Objective 2:
"Our kura is safe and inclusive and the diversities of our ākonga and Kaiako are valued. Our ākonga and kaiako feel they belong and are supported in our community" (Primary Objective 2, Section 127)

Strategic Goal 3:
(Example only) We will partner with ākonga, kaiako and whānau to make our school a safe and inclusive place for all (NELP Priority 1 & 2)

Strategic Goal 4:
{Link to NELP?}

Objective 3:

Strategic Goal 5:
{Link to NELP?}

Strategic Goal 6:
{Link to NELP?}

Approved by:

Dated:

Version:

About us: (think about these things — write as bullet points, a story narrative or visual depiction.)

- School type
- Language of instruction
- Location
- Roll
- Ethnicity (%)
- Other

Values:

(Values are basic and fundamental beliefs that our school community and help to determine what is important to us. See Creating Values Guide for how to create them.)

Decision making criteria:

(A set of ideas or rules that explains how we make decisions as a school community. See Creating Decision Making Criteria for how to create them)

Expected outcomes (The anticipated result of successful completion of your Objectives — at the end of 3 years):

Expected outcome (for Objective 1):

Expected outcome (for Objective 2):

Expected outcome (for Objective 3):

Progress indicators:

(Tangible steps that will occur and show progress ,and help to measure performance.)

-
-
-
-

Our commitment to reporting:

(Describe your process to regularly report back to your school community, and mechanisms for gaining feedback and integrating back into this Strategic Plan.)

-
-
-
-

Annual implementation plan template

Our Annual Implementation Plan — Year One, 2023

*Note: This is an early prototype developed through a limited design sprint in order to demonstrate what good planning and reporting **could** look like. This is for an English-medium schooling context only and will need to go through a full robust testing and co-design process to further develop it into a usable tool for schools. This will include ensuring a bilingual, inclusive and Te Tiriti focused approach is taken. A separate workstream will be undertaken to develop supports for Māori-medium kura.*

Name of school:

Objective 1: "Each of our ākonga in our kura will achieve to their highest possible level." (Primary Objective 1 and Section 164)

(List one of the Objectives from your Strategic Plan. You will need to do this for each of your Objectives.)

Strategic Goal(s): To enable our teachers to be confident in using latest, evidence-based practice to lift progress and achievement of every ākonga, with a particular emphasis on te reo matatini and pāngarou/literacy and numeracy. (NELP Priority 4 & 6)

(Which Strategic Goal or Goals from the selected Objective are you attending to?)

Where you're currently at:
(High level overview of where your starting place is. Consider making the link visible to what you heard from the community, written in the Strategic Plan.)

Key action we'll take: (E.g. Detail the key actions you'll take this year to reach the successful outcome detailed below. You might want to write these as SMART actions.)

Action 1:
(Example only) Using current learner data we will identify learners who are not progressing as expected.

Who is responsible:

Action 2:
(Example only) We will evaluate and analyse what the data tells about learner progress to identify which elements of our te reo matatini and pāngarou/literacy and numeracy teaching we need to develop and improve.

Who is responsible:

Action 3:
(Example only) will work with kaiako and whānau to develop approaches to develop, sustain and embed what works for our learners in our school.

Who is responsible:

Action 4:
(E.g. XXX.)

Who is responsible:

What success looks like this year:
(Think about the overall expected outcome written in the Strategic Plan and write the outcome(s) you'd like to achieve this year.)

How will we measure impact:
(Think about the overall progress indicators and commitment to reporting written in the Strategic Plan and detail the measurements you'll capture and report on this year. You'll want to reference the progress indicators in your Strategic Plan template.)

What resource is required:
(Detail the resources needed to achieve a successful outcome.)

How will we keep our community informed:
(Detail the ways in which you'll keep your community informed and continue to keep them as part of your process.)

Approved by:

Dated:

Version:

Examples of good Strategic/Annual plans

Placeholder

Placeholder

Checklist for setting your school/kura direction

We have:

☐ Listened to all feedback received from our school community and captured what we have heard.

☐ Shared what we heard with our community and given them an opportunity to review and respond.

☐ Determined the direction of the school, using the feedback received from the community.

☐ Captured the goals and direction as a Strategic Plan in a format that bests suits the school and community.

☐ Shared our Strategic Plan with the community and given them an opportunity to review and respond.

☐ Created an Annual Implementation plan.

☐ Reassessed when things will get delivered as part of our Annual Implementation Plan.

☐ Checked that the strategic or annual plans:

  ☐ Ensures that ākonga, whānau and community aspirations are visible

  ☐ Uses feedback to inform planning

  ☐ Reports back on what was heard from the community

  ☐ Uses qualitative and quantitative data to inform goals and planned actions

  ☐ Follows regulations

  ☐ Covers:
    › Te Tiriti o Waitangi
    › Primary objectives
    › NELP
    › Curriculum
    › Attendance and engagement

5. Share your plans

Publish your plans on your school/kura website and share them with your community and with the Ministry of Education.

What you might make

» Communications to go to your community.

How might this be done

» Prepare your strategic plan by 1 January.

» Publish your strategic plans on your school/kura website. If you do not have a website you can ask the Ministry to publish it on our Education Counts website.

» Submit your Strategic Plan to the Secretary of Education by 1 March.

» Publish your Annual Implementation Plan by 31 March.

» Determine other methods to share the plan to ensure all the school/kura community can access it.

» Consider how you can incorporate your strategic goals into your ongoing school activity.

Annual planning actions

» Publish your Annual Implementation Plan on your school/kura website.

» Share with the community and the Ministry.

Strategic planning actions

» Publish your Strategic Plan on your school/kura website.

» Share with the community and the Ministry.

Sharing guidance

Checklist for sharing

When sharing your plans with your community, make sure you consider:

Channels

» What's the most appropriate way to reach your audience? Is it:

› Digitally

› Physically

› In-person

› Using a representative, or

› A mix of these.

Languages

» Is there a way to share your plan that allows non-English speakers to understand it?

Accessibility

» Can your plan be accessed by those who have a disability or by people who have limited access to digital material and resources?

We have:

☐ Published the Strategic Plan on your school/kura website and submitted the Strategic Plan to the Secretary of Education by 1 March.

☐ Published the Annual Implementation Plan on your school/kura website by 31 March.

☐ Shared the plans with the community using a number of channels to ensure it reaches to the whole community.

☐ Share and discuss your plans with your ERO Evaluation Partner.

6. Deliver and improve

Put the plan into action and create positive changes for all ākonga in your school/kura.

How might this be done

» Using the key actions from the Annual Implementation Plan, determine what resources are needed to achieve the target.

» Regularly reporting on progress to the school board.

» Acquiring the resources needed.

» Making decisions about how resources are allocated.

» Making the required changes.

Annual planning actions

» Appropriately resource the improvement actions identified in the plans.

» Take the actions specified in your Annual Implementation Plan.

» Regularly monitor your progress against your targets and adapt your actions where needed.

» Regularly share your progress with your community, show how you are working to meet their priorities.

7. Reflect on progress

Looking back on the year and evaluating performance and progress made, report this to the Ministry of Education and your community, and using what you have learned to inform your next Annual Implementation Plan.

How might this be done

» Use data gathered throughout the year (ongoing engagement, surveys, progress and achievement data, etc.) to assess progress made.

» Understand if actions taken have made a difference, especially for the priority groups in your community.

» If targets have not been achieved, understand why not.

» Report progress to the community using appropriate channels in an easily understood manner. If you haven't been able to make the progress intended, make sure to explain why.

What you'll make

» Annual Report Including Statement of Variance.

Annual planning actions

» Reflect and assess against your signs of progress.

» Evaluate the outcomes achieved this year.

» Report against key milestones to the community and the Ministry.

Resources

» [ERO Effective School Evaluation](#)

» [Statement of Variance Reporting template](#)

» ERO/MoE Effective School Evaluation

Statement of Variance reporting

Statement of Variance Reporting

MINISTRY OF EDUCATION
TE TĀHUHU O TE MĀTAURANGA

School Name:		School Number:	

Strategic Aim:	Click here to record your strategic aim (as set out in your charter).
Annual Aim:	Click here to record your annual aim (as set out in your charter).
Target:	Click here to record your target/s that relate to you annual and strategic
Baseline Data:	Click here to record your baseline data. This is your starting point and v the year.

Actions *What did we do?*	Outcomes *What happened?*	Reasons for the variance *Why did it happen?*	Evaluation *Where to next?*
Record the specific actions you have taken throughout the year to achieve, or make progress towards achieving, the target set out in your charter. These actions may include changes to practice, implementation of different strategies, use of new resources/personnel etc.	Record details of the outcomes you have achieved in relation to the target you set. Provide numbers and percentages where appropriate (eg, of students or cohorts of students that are now achieving at expected levels). You may also like to consider recording outcomes such as the reaction/response of teachers and/or students to the specific actions taken (were there changes in attitude, motivation or ...ement.	Record an analysis of your results and discuss the possible reasons for any difference in the aims and targets set in your charter and the outcomes you have achieved. You might like to consider the following questions: - Why did you get (or not get) the outcomes you thought you would? - Which strategies worked well and had a significant impact on your progress in achieving your target? Why do you think this was the case? - Which strategies were not effective and had little or no impact in achieving your target? Why do you think this was the case?	You might like to consider the following questions: - Based on the outcomes and the reasons for these, what will you do the same/ differently next year? - What impact is there on current and ongoing teaching practice as a result of the actions taken and the results? - Have you identified any ongoing teacher or student needs? - What funding/resourcing may be necessary to support identified actions and needs?

...rd will take to address any targets that were not achieved. This may involve including aims and targets
...s the variance.

[Placeholder]

This template is provided to spark discussions only, it is not intended to be an example of best practice for the new framework. We intend to use our March 2023 engagement to further develop this based on what we hear from schools, whānau and communities.

New Zealand Government

Ministry of Education | Statement of Variance Reporting

Checklist for reflecting on progress

We have:

☐   Used qualitative and quantitative data available to us to determine progress against targets.

☐   Checked the impact of our work on our ākonga, especially on the priority groups in your community.

☐   Taken time to understand why targets have not been met (if required) and decided how this will be addressed in the following year.

☐   Discussed our progress with our ERO Evaluation Partner.

☐   Completed Annual Report including financial statements, statement of variance, report on student progress and achievement, report on Te Tiriti o Waitangi.

☐   Shared progress with community using appropriate channels

☐   Submitted Annual Report to the Ministry by 31 May.

Frequently Asked Questions

What is the difference between 'consulting' and 'engaging'?

[Placeholder]

How recent do the engagements that feed into planning have to be?

[Placeholder]

[Placeholder]

[Placeholder]

[Placeholder]

[Placeholder]

Who can help you

There are many organisations and people you can reach out to for help with any part of this process.

Government sector and partners

Ministry of Education

Phone:

Email:

Website:

ERO

Phone:

Email:

Website:

NZSTA

Phone:

Email:

Website:

Non-government support groups

DRAFT FOR CONSULTATION