



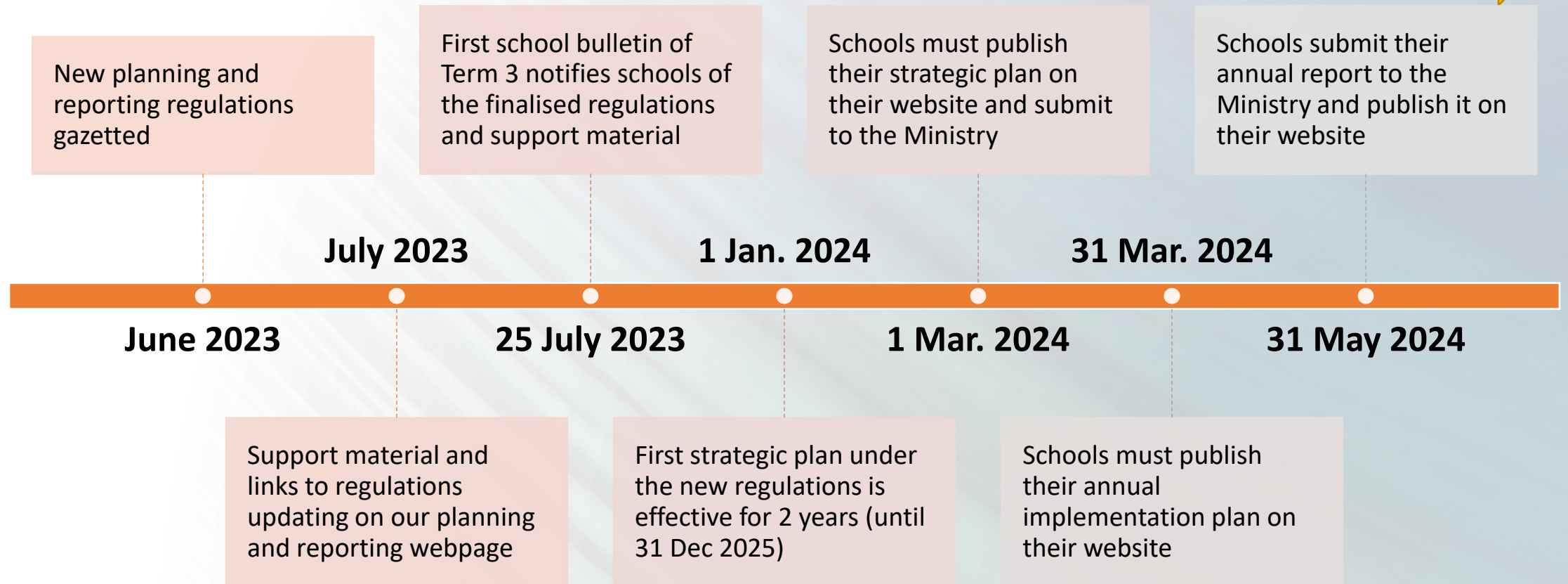
Annual Reports and AoV 2024

West Auckland Principals

February 2024

Implementation Timeline

Te Mahau staff support schools with their planning and reporting processes



What are the key changes to school planning and reporting?



Move from charters with an annually updated section to three-year strategic plans with a separate annual implementation plan.



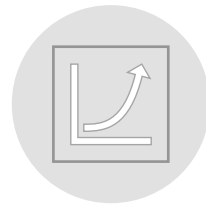
Strategic plans must provide strategies for boards to achieve, or work towards achieving, their primary objectives and for meeting community preferences and priorities.



Move from no consultation required on charters to full consultation with school communities in the development of strategic plans.



Boards must publish all planning and reporting documents on an internet site.



Annual reports now need to include an evaluation and analysis of student progress and achievement and a report on how the school has given effect to Te Tiriti o Waitangi.

For your first Annual Report under the new regulations, reporting on the 2023 year (due 31 May 2024), this will be based on what was in your last charter which was created prior to the new Education (School Planning and Reporting) Regulations 2023.

Your local Te Mahau office can support you to meet the new requirements as much as possible for this first Annual Report however we understand that this is a time of change and therefore will be a process of continuous improvement over time.

List of all school board members [OPTIONAL]

This list details the people who govern the school or kura. It may include the name of each school board member who served on the school board during the year, and the date on which that member will finish their term.

The list of school board members does not form part of the financial statements and, has been included as part of the Kiwi Park model.

Statement of variance [REQUIRED]

A statement of variance shows the progress you have made over the last year towards achieving the targets set out in your annual implementation plan. It offers explanation for any differences and how you will address targets that were not achieved.

Evaluation of the school's students' progress and achievement [REQUIRED]

This evaluation and analysis is similar to what schools already do to support governance and leadership activities. This was also required previously through [National Administration Guidelines](#) [PDF, 112 KB] (NAG) 1b and 2d. Therefore, you should be able to use your existing data collection and reporting systems to do this evaluation.

This evaluation and analysis shows how all your students have progressed and achieved over the last year. This is different from your statement of variance which reports progress and achievement only for the students you have set targets for.

Presiding Member/Principal's Report [OPTIONAL]

In this report, the presiding member and/or principal informs the school or kura community about the achievements and successes of the academic year. The report also provides an opportunity to tell staff, parents and students about the risks, challenges and opportunities coming up in the year ahead.

There are no samples provided of this kind of report in the Kiwi Park model as there are no mandatory requirements about content. Schools and kura determine what the report(s) will cover.

Report on how the school has given effect to Te Tiriti o Waitangi [REQUIRED]

Giving effect to Te Tiriti o Waitangi is one of the board primary objectives. You should describe here anything that a board has done to work towards this objective, if it hasn't already been reported on in other sections of the annual report such as the statement of variance or evaluation of student progress and achievement.

Other reports on special and contestable funding [MAY BE NECESSARY]

During the year the schools and kura may have been the recipient of additional government funding for specific purposes. Schools and kura may need to report on how these funds are used to support student development.

Statement of compliance with employment policy [REQUIRED]

The board is required to operate an employment policy that complies with the principle of being a good employer. Your board must ensure compliance with this policy (including your equal employment opportunities programme) and report in your annual report on the extent of compliance ([section 597\(1\) of the Education and Training Act 2020](#) [↗](#)).

The statement of compliance with employer policy forms part of your annual report. An optional template has been developed to assist you with completing this statement.

[\[OPTIONAL TEMPLATE\] Compliance with Education and Training Act 2020 requirements to be a good employer for the year ending 31 December 20XX](#)
[DOCX, 17 KB]

Kiwisport funding [REQUIRED]

Schools and kura are asked to include a short statement in their annual reports on how they have used their Kiwisport funding to increase students' participation in organised sport. The use of the Kiwisport funding is monitored as part of schools and kura regular Education Review Office reviews.

The Kiwisport funding does not form part of the financial statements. It should be shown as a separate statement within the annual report.

Publishing your annual report online

Your school board is required to publish the annual report on a website maintained by or on behalf of the school board at the same time as you submit your annual report to the Ministry.

If you do not currently have a website, the Ministry can host your annual report on our Education Counts website, www.educationcounts.govt.nz.

Please send your request for us to host your annual report, along with the school board's approval, to planning.reporting@education.govt.nz.

It is the school board's responsibility to ensure your annual report does not contain any information that may breach an individual's privacy before you make it publicly available.

Submitting your annual report

Secure Data Portal for submission of annual reports

Please use the [Secure Data Portal](#) link to submit your annual report to the Ministry. The Secure Data Portal is well protected and is accessed as follows:

1. Enter your log in details on the Education Sector Logon box and log in.
2. Once in the Secure Data Portal, in the How to send your File(s) to the Ministry of Education: section, click on File Type. Choose Annual Reports (31 May) to upload the annual report correctly. See **Figure 1** below.

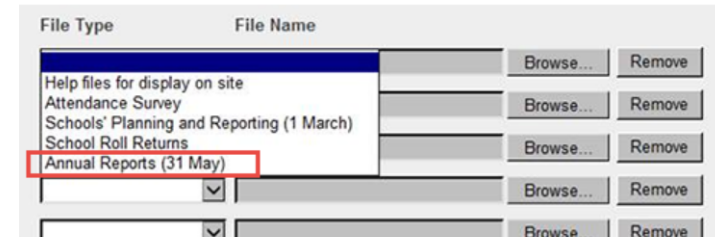
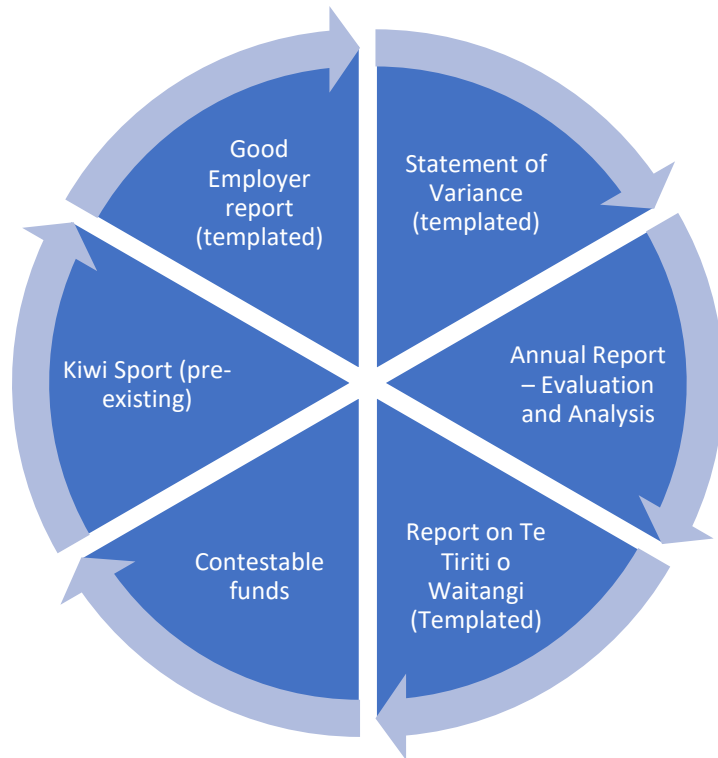


Figure 1

Reporting on 2023

Expected



Context – Your School

- 2023 annual plan – pre-scripted, delegation, assessment tools, cyclic reporting.
- SMS reporting formats.
- The assessment language you use in your school.
- Consultation data (qualitative, quantitative)
- Student report formats.
- Triadic assessment decisions.

Evaluation and Analysis Report – data or narrative ?

- Regulation 10(1)(a) does not explicitly state whether data or a discussion is required to complete this report, however the wording 'evaluation and analysis in plain language' indicates this report must include narrative or discussion as a minimum.
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- Regulation 13 also supports this by stating: 'A board must make every effort to ensure that every strategic plan, annual implementation plan, annual report, and statement of variance it produces is presented in a way that is readily understandable for its school community'.
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- Regulation 10(1) does state that the evaluation and analysis must be based on good quality assessment or aromatawai information, and regulation 10(2) states 'good quality' means the information needs to draw on a range of evidence. Therefore, schools would need to use data to evaluate the progress and achievement of students, but data does not necessarily need to be included in the report to the community.
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- Schools may wish to include data to support their discussion, but they must ensure this is done in a way that is readily understandable by their school's communities.
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- Schools should be guided by their school community about what format they would like to see this information presented in (eg, a greater focus on data, or minimal data and more focus on the discussion).

Template ? For evaluation and analysis report.

- There are no plans to make a template available for the evaluation and analysis of student progress and achievement report required to be included in a board's 2023 annual report (due 31 May 2024).
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- Schools should consider the views and needs of their community when deciding the format for completing the evaluation and analysis of student progress and achievement report.
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- This report is very similar to the one schools were previously required to complete under NAG2(d), and schools can use the format they have previously for reporting in their 2023 annual report if this meets their communities' needs.
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- The 2024 annual report (due May 2025) will be the first report boards complete against the new strategic plan and annual implementation plan. The Ministry will look at developing a template for completing the evaluation and analysis of student progress and achievement component to be available in time for the completion of this annual report.