

Strategic Planning & Reporting

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.

Your presenters

Ann Bixley – Presenter

National Advisor Governance

Belinda Weber – Q&A

Chief Advisor Governance

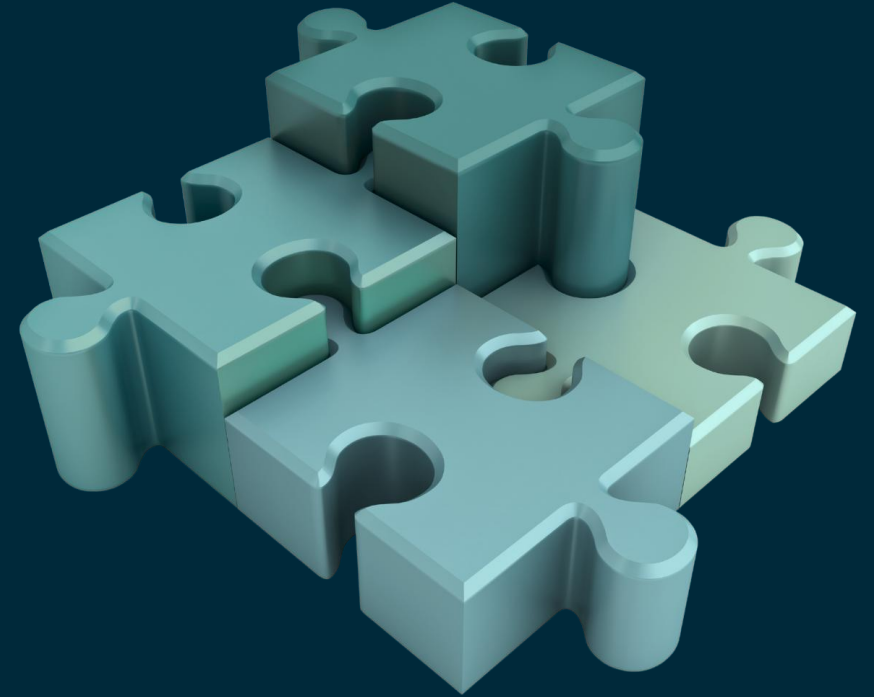
Arja Pinkney – Host

Learning and Content Development Specialist



What we'll cover

- What strategic planning and reporting means for boards
- What shapes strategic goals
- The strategic plan and measuring progress
- Monitoring and reporting
- Next steps from here



Activity (poll)

**Where is your board at
with strategic planning
and reporting?**



Part 1

What strategic planning and reporting means for boards

Why is it so important?

- Establishes a clear direction
- Improves outcomes for all students
- Allocates resources effectively
- Supports governance, monitoring, and decision-making
- Strengthens accountability and transparency
- Builds trust and buy-in



What are boards required to do?

Education and Training Act 2020

- Sets out the main rules, for example:
 - A strategic plan developed in consultation with your school community
 - An annual implementation plan that sets annual targets and actions for working towards your strategic goals
 - An annual report on the school's performance and finances

Education (School Planning & Reporting) Regulations 2023

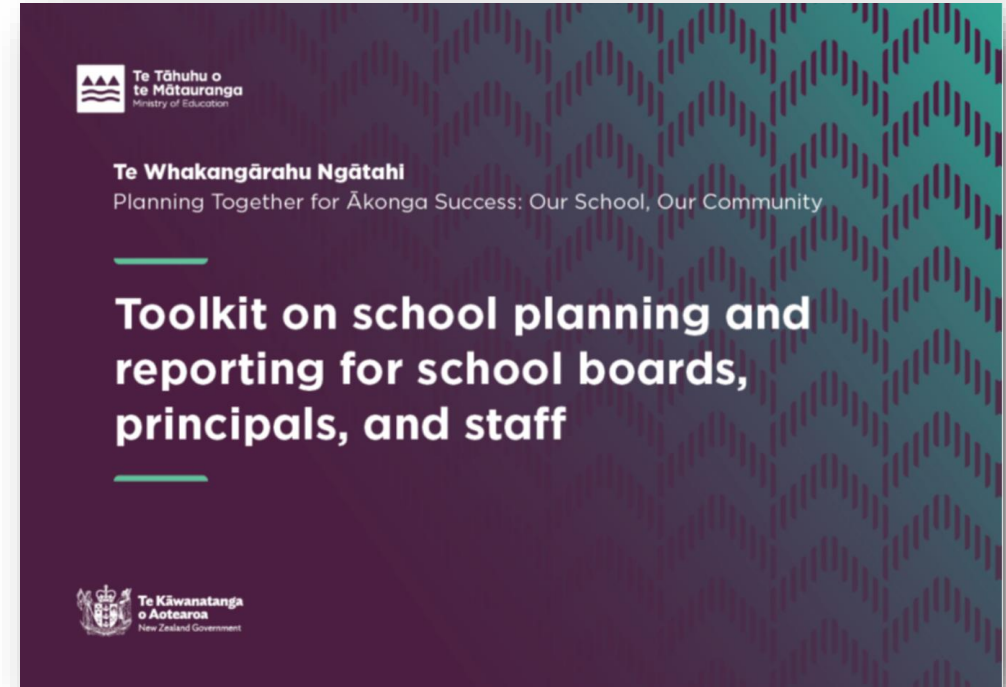
- Sets out the details, for example:
 - What goes in each plan, what must be published, and by when

What resources are available?

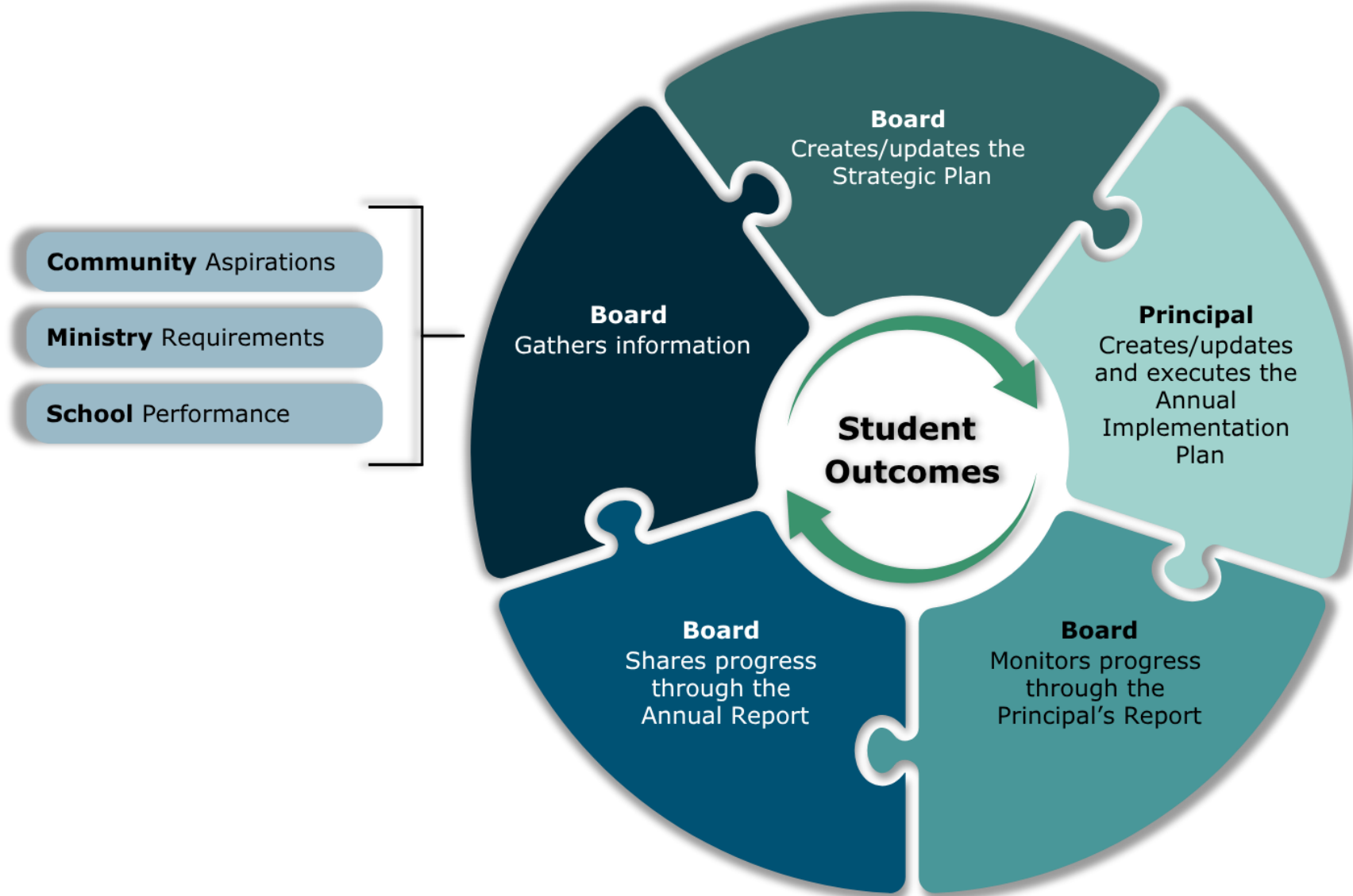
Visit the “School Planning and Reporting Framework” page (education.govt.nz)

You’ll find:

- Toolkits, worksheets, and community consultation packs
- Templates for
 - strategic plans
 - annual implementation plans
 - and annual report



The planning and reporting process



Who does what?

Shared Responsibilities	Board (Governing Body)	Principal (Chief Executive)
Consultation	Plans community consultation	Often leads community consultation
Planning	Sets direction through the Strategic Plan	Implements through the Annual Implementation Plan
Resource Allocation	Allocates resources	Advises on resource needs
Monitoring	Monitors progress	Reports on progress
Annual Reporting	Ensures the Annual Report is prepared and published	Supports the annual reporting process

Strategic planning and reporting timelines

Planning and Consultation

- Draft strategic plan developed for 2027-2028

2026

by 31 Dec

Year 1 – Implementation and Monitoring

- New strategic plan begins
- Strategic plan published online and submitted to the Ministry
- Annual implementation plan prepared and published online
- Annual report prepared, published online, and submitted to the Ministry

2027

on 01 Jan

by 01 Mar

by 31 Mar

by 31 May

Year 2 – Implementation and Monitoring

- Annual implementation plan prepared and published online
- Annual report prepared, published online, and submitted to the Ministry

2028

by 31 Mar

by 31 May

Next Cycle Begins – Planning and Consultation

- New strategic plan developed for 2029-2031

by 31 Dec

Part 2

What shapes strategic goals

What are the requirements for goals?

- At least three goals that focus on meeting the paramount and supporting objectives
- At least one of these goals must be focused on educational achievement in reading, writing, and/or mathematics or pānui, tuhituhi, and/or pāngarau



Board objectives

The paramount objective is for **every student to attain their highest possible standard** in educational achievement.

Your board must meet supporting objectives that ensure the school:

Meets attendance obligations

Achieves equitable outcomes for Māori

Monitors and evaluates student progress using quality assessment or aromatawai information

Endeavours to make teaching and learning available in te reo Māori (if requested)

Is a physically and emotionally safe place for all students and staff

Reflects New Zealand's cultural diversity in its policies and practices

Is inclusive of, and caters for, students with differing needs

Meets curriculum, teaching, and student progress obligations

Community aspirations

- Use the Ministry's toolkit to guide community consultation
- Consider how you care for the information
- Gather input from whānau, students, and staff
- Review and group feedback into key themes
- Share back what you've heard with your community



School performance

- What does the information tell you? (principal's reports, school data, ERO review, etc.)
- How well are you currently meeting the paramount and supporting objectives?
 - Achievement and progress trends
 - Attendance, engagement, and wellbeing patterns
 - Outcomes for priority groups
 - Strengths and areas for improvement
- What is the resourcing capacity (financial, staff, physical, etc.)?

From information to goals

- What are the key themes, strengths, and areas for improvement?
- What does your community value?
- What would make the biggest difference in students achieving?
- Which priorities best align with your vision and values?
- What can realistically be resourced and sustained?



Part 3

The strategic plan and measuring progress

Ministry strategic plan template

[insert your school vision here]

Describe how you prioritised your strategic goals

State your strategies for seeking equitable outcomes for Māori students, or

How the kaupapa of your kura reflects Te Tiriti o Waitangi (for specified kura boards only)

What are your strategic goals?	Which board objective is this strategic goal aligned with?	How does this strategic goal link to curriculum statements?	What do you expect to see?	How will you achieve or make progress towards this strategic goal?	How will you measure success?
Your priorities for improvement. A minimum of three goals, with at least one for educational achievement.	Paramount and supporting objectives.	NZ Curriculum or Te Marautanga o Aotearoa. Optional link to other national education strategies.	The changes in practices and student outcomes you want to achieve.	What high-level tangible steps will you take? Must be based on the identities, needs, and aspirations of your school community. Must also identify and cater to students whose needs have not yet been well met.	How will you evaluate the impact? What success indicators/tools/rubrics will you use? What sources of evidence will you gather? Who will be involved?

An example

Vision: Growing confident, resilient, and culturally grounded young people who learn, lead and succeed as themselves.

Prioritised by: Consultation and data analysis highlighted the importance of strong relationships, a sense of belonging, culturally responsive teaching, regular attendance, and high expectations for achievement.

Strategies: Strengthening cultural responsiveness and relationship practices across the school.
Embedding local context, histories, mātauranga Māori and tikanga Māori in teaching programmes.

Strategic Goals	Which board objective is this strategic goal aligned with?	How does this strategic goal link to curriculum statements?	What do you expect to see?	How will you achieve or make progress towards this strategic goal?	How will you measure success?
All our Pacific students will have regular attendance by the end of 2028. Attendance data from 2026 shows 72% of Pacific students are attending school regularly.	Take all reasonable steps to make sure enrolled students attend school when it is open. To ensure every student can attain their highest possible standard of educational achievement.	Aligns with the New Zealand Curriculum vision of confident, connected, actively involved, lifelong learners. Supports the Action Plan for Pacific Education 2020-2030. Regular attendance is a critical enabler of engagement, achievement, wellbeing, and successful educational pathways.	Reduction in chronic and persistent absence rates in Pacific students. Increased belonging, engagement, and positive relationships with teachers. Improvement in academic achievement of Pacific students. Stronger partnerships with the different groups that make up our school community.	Strengthen culturally responsive attendance practices. Use early identification, monitoring, and targeted intervention processes. Celebrate regular and improved attendance. Build staff capability - Tapasā and Professional Learning opportunities. Increase of Pacific voice in decision making and representation on board.	Monitor daily attendance. Review effectiveness of AMP / STAR responses. Surveys – students, staff, Pacific families and community leaders. Engagement measures - in class and co-curricular activities. Academic achievement. Monitor referral data – pastoral care. Concerns and complaints.

Part 4

Monitoring and reporting

Monitoring progress

- Use your progress indicators and success measures
- Agree on what will be reported to your board and when, and schedule it in your workplan
- Monitor progress through principal reports
- Ensure reporting provides the information your board needs
- Ask: What difference is this making for learners?
- Identify where support, resources, or changes are required



Reporting

Annual Report

- Share with Secretary for Education and your community
- What have you achieved with the resources you were given?
- What is next for your learners?

Engage with your community

- How has community feedback made a difference?



Part 5

Summary, support, and next steps

Reflection and next steps

What we covered today:

- What strategic planning and reporting means for boards
- What shapes strategic goals
- The strategic plan and measuring progress
- Monitoring and reporting



Support and information

Visit Us



Resource Centre

resourcecentre.org.nz

Learning Library

Slide Decks and Videos

Help for Boards

- ▶ **Strategic Planning & Reporting**
- ▶ **Community Engagement**
- ▶ **Student Achievement**

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Closing the session

Unuhia, unuhia

Draw on, draw on

Unuhia ki te uru tapu nui

Draw on the supreme sacredness

**Kia wātea, kia māmā,
te ngākau, te tinana,
te wairua i te ara tangata**

To clear, to free the heart, the
body, and the spirit of mankind

**Koia rā e Rongo,
whakairia ake ki runga**

Rongo, suspended high above us

Kia tina! Tina! Hui e! Tāiki e!

Draw together! Affirm!



Ngā mihi nui!
Thank you!