



NZSTA

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Governance support resources

New planning and reporting framework for boards

Planning and reporting are the main ways for boards and their schools, kura, and communities of learning | kāhui ako to:

- implement the Government's education objectives in the Education and Training Act 2020
- achieve better education and learning outcomes for their students and ākonga.

Next year 2022, is the last year the board must have a charter. A new planning and reporting framework comes into effect on 1 January 2023:

- the board's 2022 charter becomes the board's first (transitional) strategic plan. How long this plan stays in place will be determined by regulations
- future 3-year strategic plans will stay in place for up to three years.

See below for more about the changes.

What boards should do now

Here are the board's key planning and reporting requirements for **this year and 2022**:

- update and submit a charter, including strategic and annual plans, to the Ministry of Education by 1 March
- submit to the Ministry:
 - an analysis of variance by 1 March
 - an annual report by 31 May
- publish your annual report on the school website

Preparing for the changes in 2023

With planning and reporting, many boards already take a strategic and consultative approach with their communities. Other boards may find this new framework challenging to put into place.

To prepare for the changes, your board can keep on track in the following ways:

- take a long-term (3 plus years) approach to your strategic thinking
- make sure you know the aspirations of your families, whānau and hapū before you start planning
- publish your annual report on the school website. Contact the Ministry for help to publish on a host website, if your school does not have a website
- take time to review your charter's strategic goals this year, taking into account both the Statement of National Education and Learning Priorities (NELP) and what your community has told you.

NZSTA can help with all of this.

Reasons for the changes

The planning and reporting changes aim to:

- reduce Ministry (Government) requirements for boards
- encourage boards and communities of learning | kāhui ako to take a long-term view with their planning so they can achieve targeted goals
- help schools and communities to work together to establish meaningful goals and objectives
- give parents and whānau accessible information on the school's goals, and progress towards achieving them.

By linking boards' long-term strategic planning to targeted goals your board can:

- set goals that focus on the board's four [primary objectives](#)
- take account of the NELP, to ensure the Government's priorities flow through to what happens in your school
- ensure the NELP is embedded in:
 - the school's curriculum, teaching and learning programmes
 - the principal's reporting to the board on students' progress.

More about the changes in 2023

- a 3-year strategic plan that stays in place for up to three years and sets out how the board will achieve its objectives – it must be submitted to the Secretary of Education for approval every three years
- an annual implementation plan with more detail about the board's strategic plan's objectives and targets for each year - it will not need to be submitted to the Secretary
- an annual report that includes the board's statement of variance and annual financial statements
- your board will have to:
 - consult with your school communities, staff, students, and "others" as part of preparing your strategic plan
 - publish your strategic and annual implementation plans on your school website
 - make sure your annual report includes your statement of variance and annual financial report
- new planning and reporting regulations are planned. They will provide your board with more guidance about the new framework. Consultation is expected in 2021 / 2022.

Useful links

- Free learning for boards: [NZSTA Learning and Development Programme](#)
- [Education](#) website
- [NZSTA](#) website – about the [NELP](#)
- Education and Training Act 2020:
 - in force now: sections [5](#), [10](#) ("school community"), [127](#), [639](#)
 - come in on 1 January 2023: sections [90](#), [134](#), [138-146](#), [165](#); schedule 26, [Part 2](#)



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For further advice please contact the **Advisory and Support Centre** on **0800 782 435, option 1** or govadvice@nzsta.org.nz