



NZSTA
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Governance support resources

Planning and reporting changes for school boards

The Education and Training Act 2020 (the Act) incorporates a new planning and reporting framework for school boards that will come into effect on 1 January 2023. The Act also has provisions that guide boards through the transition from the current framework. (The “new” framework does not come as a complete surprise for boards; it was in fact introduced into the Education Act in 2017 and first planned to come into effect in 2019).

For now, and until 2023, the board’s key planning and reporting documents: charter, including strategic plan, annual plan and analysis of variance stay in place during the years of 2021 and 2022. Boards need to align their charter towards the new framework over this time. This is because in 2023, boards will no longer review their charter annually, and the board’s 2022 charter becomes its first or transitional strategic plan. This stays in place until boards are required to submit their first 3-year strategic plan under the new framework.

Once the framework is in place, other changes for boards mean they must consult on their draft strategic plan with their school communities and others, including their staff and (where appropriate) their students; and while they will still need to approve an “annual implementation plan”, they will no longer need to send this to the Ministry of Education.

Boards will continue to prepare an annual report, including annual financial report and “statement of variance”, submit that to the Ministry, and publish it on their website. Boards will also be required to publish their strategic and annual implementation plans on their website.

Ministry consultation on new planning and reporting regulations is scheduled for 2022. The regulations will provide more detailed guidance or boards about what is required with the new framework.

Why the planning and reporting changes

Planning and reporting are the main ways that boards and their schools, kura and communities of learning | kāhui ako implement the Government’s objectives for education specified in the Act, and achieve better education and learning outcomes for their students and ākonga.

The planning and reporting changes are to make requirements less complex and detailed for boards, particularly by changing the requirement for boards to submit to the Ministry an annually updated charter and annual plan. Having to submit a 3-year strategic plan instead, will also encourage boards to take a long-term view with planning for their schools. This is the most effective way to achieve targeted goals. The changes also intend parents and whānau to receive more useful information on the school’s aims and progress towards achieving them.

The changes link boards’ long-term strategic planning to targeted goals around lifting student achievement, by ensuring boards focus on their primary objectives, and pay particular regard to the first National Statement of Education and Learning Priorities (NELP) announced in November 2020. It is also intended that boards ensure the NELP is embedded in their school’s curriculum, teaching and learning programmes. and in the school’s monitoring and reporting on students’ progress.

What boards need to do now

The new planning and reporting framework has been signaled since 2017. Already, many boards take a long-term strategic approach to their planning. They also have well established processes for consulting with their school

communities and others around their proposed key planning objectives, and already publish their charter, strategic and annual plans on their websites. For those boards who take a more year-by-year approach, and do not have well established community consultation and reporting processes, now is the time to start changing this!

Schedule time during 2021 to review strategic objectives, in light of the first NELP. Make sure your board is ready to take the NELP into account in its 2022 plan, starting with its community consultation.

NZSTA advice and support

NZSTA will continue to support boards to develop good quality charter and strategically focused planning documents by providing online and face-to-face learning and development opportunities for trustees. This will ensure boards are well prepared for when these changes come into effect.

Resources

[NZSTA](#) website

[Education](#) website

Education and Training Act 2020:

- [section 127](#): the board's (four) primary objectives
- [section 5](#): statement of national education and learning priorities
- [section 134](#): statements of variance and annual reports (comes into effect on 1 January 2023)
- [sections 138 – 146](#): strategic planning and reporting (come into effect on 1 January 2023)



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