

Te Whānau o Ōtūmatua Board of Trustees

Kura Planning and Reporting Policy

Purpose

This policy will ensure the kura meets all legislative and regulatory requirements for planning and reporting, and to provide clear, transparent information about our strategic direction, annual priorities, performance, and use of resources.

Policy

The board follows the planning and reporting framework set out by the Ministry of Education. Under the Education and Training Act 2020, the board must develop and publish documents that:

- communicate strategic goals and priorities
- describe plans to achieve these goals
- report on progress
- provide financial information

The board consults with the kura community to develop strategic goals and annual implementation plans, and to reflect on performance against these goals.

All planning and reporting documents are written clearly, published online, and comply with privacy requirements.

Guidelines

1. Planning Framework

To meet the requirements of *Te Whakangārahu Ngātahi | Planning Together for Ākonga Success* (the Ministry of Education planning framework), the board develops:

- **A strategic plan** that sets out how the board meets its responsibilities under the Education and Training Act
- **An annual implementation plan** that sets annual targets and actions aligned to the strategic plan
- **An annual report** that outlines how finances and resources have been used to progress strategic goals

These documents are publicly available online, with all privacy requirements upheld.

2. Community Consultation

As required under the Education and Training Act (s 139), the board consults with the kura community to:

- develop strategic goals
- develop annual implementation plans
- reflect on performance against goals and priorities

Consultation is ongoing and informs the board's decisions about objectives, priorities, strategies, and actions.

(See: *Kura Community Engagement Policy*)

3. Strategic Plan

3.1 Content Requirements

The strategic plan includes detailed information about:

- the kura vision
- strategic goals developed in consultation with the kura community
- prioritisation of strategic goals
- links to:
 - national education strategies (e.g., Ka Hikitia, Action Plan for Pacific Education, Oranga Tamariki Action Plan)
 - foundation curriculum policy statements and national curriculum statements
 - MoE High priority expectations e.g. 90% Attendance for ākongā
- strategies for achieving or progressing strategic goals, based on the identities, needs, and aspirations of the kura community
- strategies for:
 - achieving equitable outcomes for Māori students
 - providing teaching and learning in te reo Māori when requested
 - ensuring policies and practices reflect New Zealand's cultural diversity
- measures, evidence, and processes for evaluating progress

3.2 Publication

The current strategic plan:

- is in effect from **01/01/2026** to **01/01/2029**
- has been submitted to the Ministry of Education
- is available online

4. Annual Implementation Plan

4.1 Content Requirements

The annual implementation plan outlines how the board will implement the strategic plan during the year. It includes:

- previous year's performance and actions to address unachieved targets
- annual targets for each strategic goal
- actions to achieve these targets
- allocation of resources
- measures and evidence to evaluate progress
- teaching and learning strategies and programmes, with emphasis on:
 - Self-management skills to develop long life engagement
 - Individualised programmes to increase purposeful, mana enhancing learning
 - Priority areas of curriculum as guided by MoE
 - te reo māori and pāngarau
 - Effective transition plans to support whānau and local schools re-engage with ākongā

4.2 Publication

The annual implementation plan is published online **by 31 March each year**.

5. Annual Report

5.1 Content Requirements

The annual report provides key performance information to the Ministry of Education, members of parliament, parents, and the wider community. It includes:

- kura finances and funding
- a **statement of variance** outlining:
 - the impact of actions taken to achieve targets
 - reasons for any differences between targets and performance
 - how these differences will inform next year's planning
- progress and achievement of all students, including students whose needs have not yet been well met
- compliance with employment policies

(See: Employment and Personnel Policy, and Equal Employment Opportunities Policy)

5.2 Submission Requirements

- Annual financial statements submitted to the kura auditor **by 31 March**
- Annual report (including audited financial statements) submitted to the Ministry of Education **by 31 May**
- Annual report published online as soon as practicable

6. Board Assurance

The tumuaki assures the board that:

- the current strategic plan has been submitted to the Ministry and published online
- the annual implementation plan has been published online by 31 March
- financial statements have been submitted to the auditor by 31 March
- the annual report (including audited financial statements) has been submitted to the Ministry by 31 May and published online

(See: Information and Reporting Integrity Policy)

Review Schedule

This policy will be reviewed according to the Board's Review Schedule or earlier if required due to legislative change or identified need.

Prepared by: Gabrielle Wall, Commissioner

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