



GOVERNANCE FACT SHEET

School planning and reporting for school boards, principals, and staff in Catholic state integrated schools

Under the Education and Training Act 2020 (the Act), a new planning and reporting framework came into effect on 1 January 2023. Te Mahau/Te Tāhuhu o te Mātauranga (Ministry of Education) framework for school planning and reporting, called [Te Whakangārahu Ngātahi | Planning Together for Ākonga Success: Our School, Our Community](#) is now in place.

This fact sheet will assist **Catholic schools** in implementing these changes for their context and meet the requirements for state integrated schools set out in the Act. Matters strictly concerning Catholic schools have been highlighted in **orange**.

Why is school planning and reporting so important?

Effective planning and reporting underpin all other work that schools do. Catholic schools need to intentionally plan, and evaluate their performance to:

- Give effect to Te Tiriti o Waitangi
- **Strengthen Catholic special character**
- Meet legislated board primary objectives and show how the school has given particular regard to the NELP¹.
- Ensure the needs, **including faith needs**, of all ākonga are met
- Ensure the voices of **the proprietor**, all ākonga and whānau are heard
- Develop and implement teaching and learning programmes, that give effect to curriculum requirements in ***Tō Tātou Whakapono Our Faith Religious Education Curriculum for Catholic Schools in Aotearoa New Zealand*** and *The New Zealand Curriculum* to improve outcomes for all ākonga.

¹ NELP are the National Education Learning Priorities for more information see the [Ministry of Education](#)

Te Whakangārahu Ngātahi | Planning Together and the Act requires your board to develop:

- a 3-year strategic plan developed in consultation, with your school community, **including your proprietor²**, that sets out how the board will meet their primary objectives (set out in the Education and Training Act 2020)
- an annual implementation plan that sets annual targets, including **Catholic special character targets**, and actions for working towards their strategic goals, **including Catholic special character goals³**
- an annual report that reports on the school's progress and finances.

Your board's first strategic plan will be for a timeframe of 2 years (1 January 2024-31 December 2025) to align the strategic planning cycle with board triennial elections.

Te Mahau/Te Tāhuhu o te Mātauranga have designed a toolkit to support your board and principal to implement Te Whakangārahu Ngātahi | Planning Together. The [toolkit](#) sets out the detailed requirements of your planning and reporting documents, including seven steps to follow in the process. **For Catholic schools the process information on the following pages will be useful.**

² Clause 24 (4) Schedule 6 of the Act requires 'the board of a state integrated school must provide for adequate consultation between the board and the proprietor of that school'.

³ Clause 139 (3) (C) 'in the case of a state integrated school, ensure that the plan reflects the school's special character'

How does Te Whakangārahu Ngātahi work?

The process in detail for Catholic Schools

1 Prepare for planning

Before you begin any planning:

- ❓ Determine how well you are giving effect to Te Tiriti o Waitangi and determine your next steps.
- Determine how well the Catholic special character (CSC) of your school is serving the needs of Katorika Māori.
- Determine how well your school is meeting the board's primary objectives including meeting the goals of Catholic education as set out in [The Declaration](#).
- ❓ Know the new planning and reporting regulations and requirements that guide you including [Clause 24 \(c\) Schedule 6: and Clause 139 \(3\) \(c\) Education and Training Act 2020](#).
- Ensure that your board and principal understand Te Whakangārahu Ngātahi.

2 Understand who is in your community

Strategic planning

Identify local marae, hapū, and iwi learn about their history.

Gather information that helps you understand and prepare for community engagement e.g. through community census data, records of concerns and complaints.

Identify the people/groups you should target during your engagement. This could include learners who aren't present, participating or progressing to their potential.

Identify any representatives in your school, e.g. whānau with disabilities, and community that they would like you to work with.

Annual planning

Review how relevant and up to date the information previously gathered is. Update as necessary.

3 Engage with your community

Strategic planning

Identify the most appropriate ways to engage with different members of your community. This should include:

- Ākonga
- Parents and whānau
- Hapū and iwi
- ❓ School staff
- ❓ The proprietor
- ❓ The parish leadership team (primary)
- ❓ Other community groups/interests, e.g. special character representatives, disability communities, business groups.

Carry out targeted and general forms of engagement with ākonga, whānau and community to understand their needs, aspirations, and what matters to them.

Annual planning

Continue to listen to your community about their needs and aspirations, focusing on any changes.

4 Set your school direction

Strategic planning

Make sense of what your community has told you about their needs, aspirations, and what matters to them.

Check this information is accurate by sharing what you heard back with your community.

Check that the board's primary objectives are covered in your strategic plan.

Set the direction (vision, goals, and measures) and decide when things will happen if you have both Māori or Pacific pathways or learning support units ensure that your plan covers all of these.

Capture in a way that best suits your school and can be shared with your community.

Refine with your community as many times as necessary.

Annual planning

Draft the annual implementation plan based on the strategic plan and the previous year's progress. Ensure that if you have both English and Māori or Pacific pathways that your plan covers both.

Reassess and confirm when things will happen.

Check back with your community as often as necessary.

5 Share your plans

Strategic planning

By 1 March of the year your strategic plan becomes effective, publish your strategic plan on a website.

Share your strategic plan with your community *including your proprietor and parish leadership team (primary)*, and the Ministry. You may also share this with the ERO and *diocesan evaluation* Partner.

Annual planning

By 31 March of each year, publish your annual implementation plan on a website.

Share with your community *including your proprietor and the parish leadership team (primary)*.

6 Deliver and improve

Annual planning

Appropriately resource the improvement actions identified in the plans.

Implement your annual plan to make the improvements.

7 Reflect on progress

Annual reporting

Regularly reflect on, review, and assess your progress throughout the year.

Share progress with your community and offer opportunities for feedback.

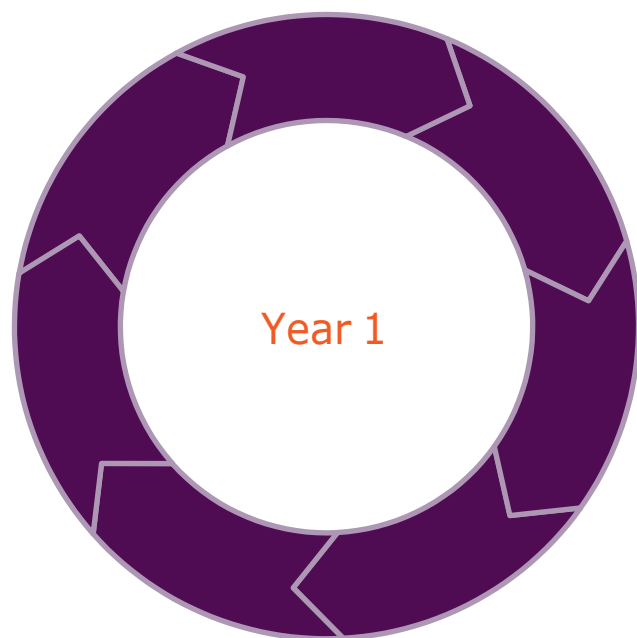
Evaluate the outcomes achieved each year.

Report against key milestones to the community, *including your proprietor and parish leadership team/s (primary and secondary)*.

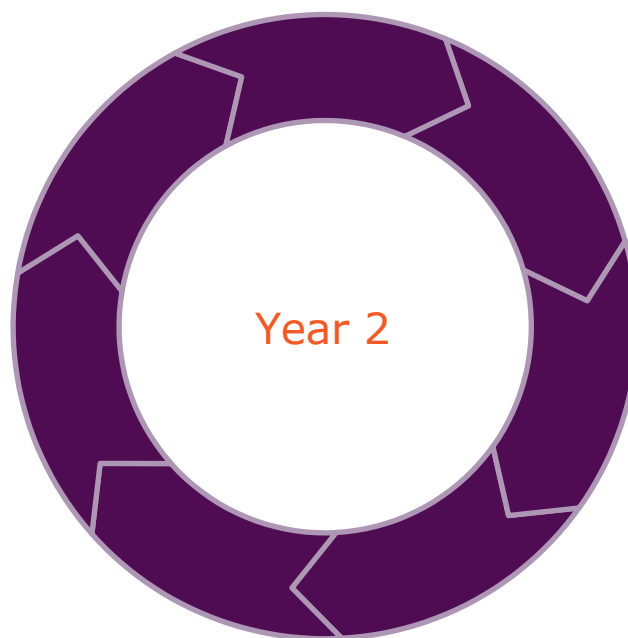
By 31 May of each year publish your annual report on a website and submit to the Ministry. You may also like to, share this with your ERO and *diocesan evaluation* partner/team.

What are the key dates?

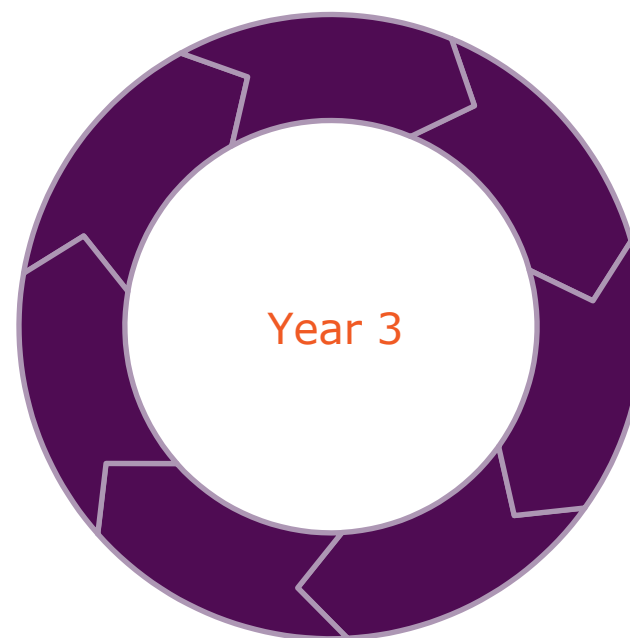
The timeline



- 1 January Strategic plan effective from this date
- 1 March Strategic plan published and submitted to the Secretary
- 31 March Annual implementation plan prepared and published
- 31 May Annual report published and submitted to the Secretary



- 31 March Annual implementation plan prepared and published
- 31 May Annual report published and submitted to the Secretary



- 31 March Annual implementation plan prepared and published
- 31 May Annual report published and submitted to the Secretary
- 31 Dec Strategic plan expires

Note: the first strategic plan under the new framework (effective 1 January 2024) is only for 2 years to align with the triennial board election cycle.