



Implementing Te Whakangārahu Ngātahi | Planning Together

Changes to schools' planning and reporting



Purpose of this pack

This pack is for school leaders and boards.

It provides an outline of the changes to schools' planning and reporting. This pack is designed to help you prepare to implement the changes when regulations are finalised in July 2023.

What are the changes and why are they happening?

Te Whakangārahu Ngātahi aims to improve schools' planning and reporting practices, by having schools and kura working together with their community throughout their planning and reporting processes, to focus on delivering equitable and excellent outcomes for all ākonga.

On 1 January 2023, changes to how schools plan and report came into effect. The key changes are:

- » Your school or kura charter will be replaced by a three-year strategic plan and an annual implementation plan.
 - › Note: It is proposed that the first strategic plan under new regulations be effective from 1 January 2024 and be in place for two years to align with board triennial elections. Strategic plans from 1 January 2026 will be in place for three years.
- » Your board must consult your school or kura community when it creates its strategic plan.
- » Strategic plans must work towards achieving your board's primary objectives as set out in s127 of the Education and Training Act 2020.

[Board objectives](#)

- » National Education Goals (NEGs) and National Administrative Guidelines (NAGs) ceased to have effect from 1 January 2023.
- » Most requirements from the NEGs and NAGs have shifted into the Education and Training Act 2020, other requirements are in new proposed Regulations, the National Education and Learning Priorities (NELP), and the National Curriculum (some of which will happen through the Curriculum Refresh). Refer to our NEGs and NAGs webpage for details on where each requirement has shifted to.

[NEGs and NAGs webpage](#)

- » Your board must publish all planning and reporting documents on an internet site so parents, whānau and communities have easy access to the information. Your board's annual report must include a statement of variance (this replaces the analysis of variance).
- » It is proposed that annual reports will also include an evaluation and analysis of student progress and achievement and a report on how the school has given effect to Te Tiriti o Waitangi.

Legislative requirements

You can read the detailed legislative requirements in the Education and Training Act 2020. Here is a quick reference guide showing the relevant sections of the Act:

[Schools' Planning and Reporting Legislation Quick Reference Guide](#)

To get an idea of what the regulations may look like you can view the draft regulations that we publicly consulted on during March 2023. We are currently working to finalise the Regulations by July 2023:

[Draft School Planning and Reporting Regulations](#)

How will these changes support other changes in education?

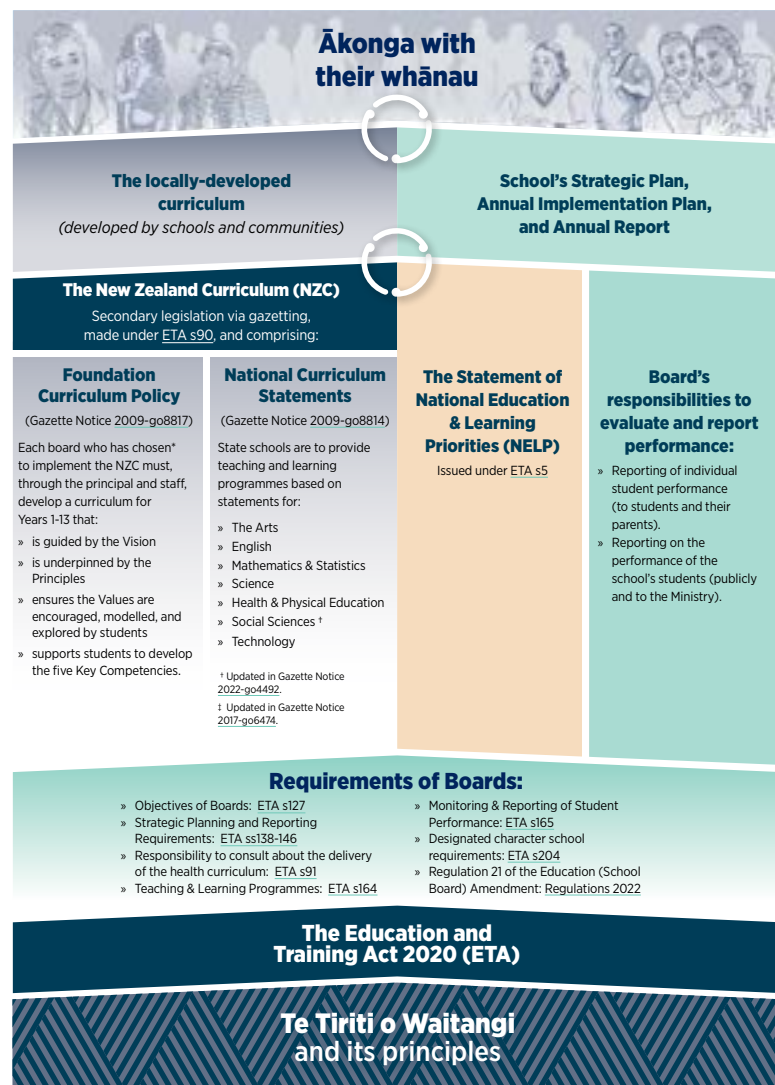
School planning and reporting underpins everything that a school does. Having an effective planning and reporting process, which includes working alongside your community, will put you in a good position to implement other changes.

The diagrams on the next page show how school plans and reports work with the curricula and other legislation.

Note: The full-sized versions of these diagrams can be found on our TKI website.

Legislative Framework and New Zealand Curriculum

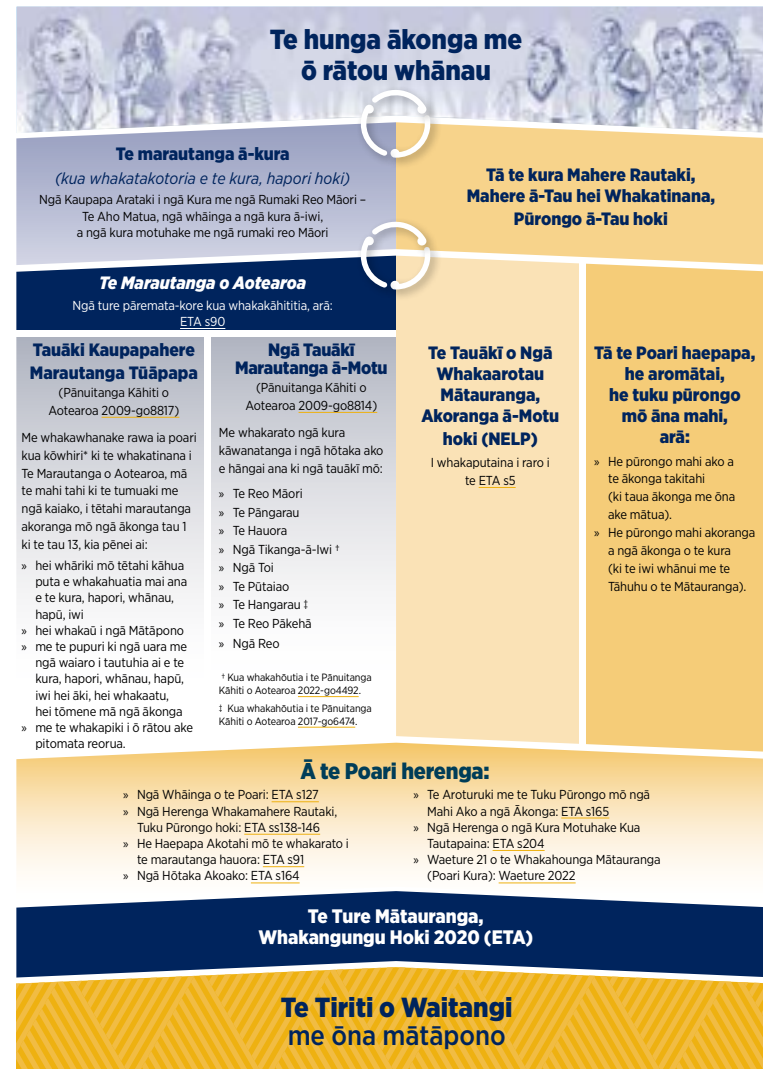
The Legislative Framework and New Zealand Curriculum



* This diagram describes the settings for the NZC. The legislative framework for *Te Marautanga o Aotearoa* is online: *Te Marautanga o Aotearoa* | *Kauwhata Reo* and *Te Marautanga o Aotearoa* / *Kāinga* - *TMOA* (tki.org.nz). Schools must choose to develop and implement a curriculum based on either the NZC or *Te Marautanga o Aotearoa*. If a school has a bilingual class or classes where Māori is one of the languages of instruction, it may develop and implement a curriculum based on *Te Marautanga o Aotearoa* for those classes, and on the NZC for the rest of the school, in Gazette Notice: 2009-go8817.

Te Anga Ture me Te Matauranga o Aotearoa

Te Anga Ture me Te Marautanga o Aotearoa



* He hoahoa whakaahuā tauhuinga tēnei mō *Te Marautanga o Aotearoa*. Me kōwhiri rawa ngā kura ki te whakawhanake me te whakatinana i te marautanga i runga anō i *Te Marautanga o Aotearoa* i te *New Zealand Curriculum* rānei.
Me he akoranga reorua tō te kura e kawea ana i te reo Māori hei reo whakaako, ka āhei te whakawhanake me te whakatinana i te marautanga i runga anō i *Te Marautanga o Aotearoa* ki aua akoranga, ā, me te *New Zealand Curriculum* mō tērā atu wāhanga o te kura, tirohia te Pānuitanga Kāhiti o Aotearoa, 2009-go8817.
Kia <https://nzcurriculum.tki.org.nz/The-New-Zealand-Curriculum> te anga ture e pā ana ki te *New Zealand Curriculum*.

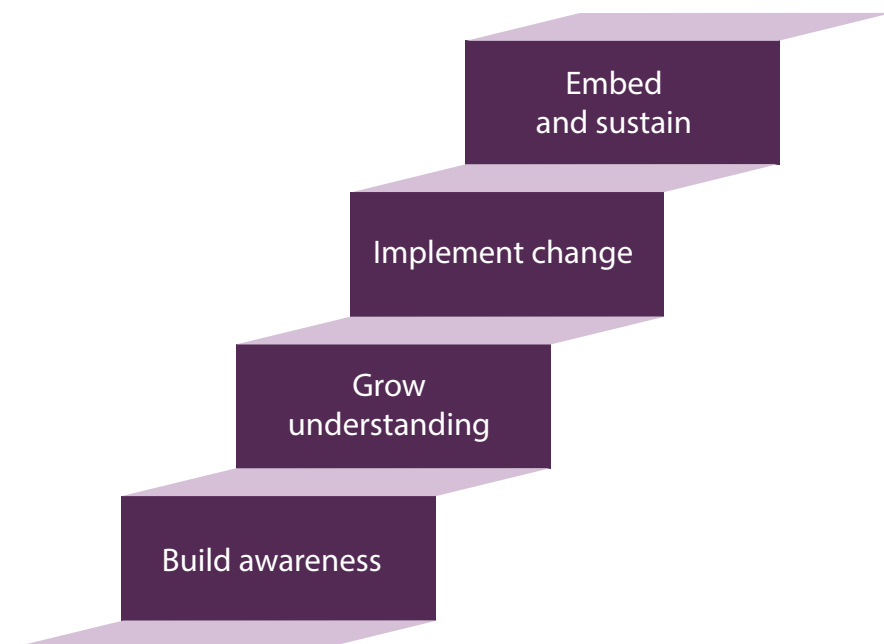
The change process

The change process proceeds in four phases outlined in the diagram below.

Your first strategic plan under the new framework, is proposed to be effective from 1 January 2024 (submitted and published by 1 March 2024).

Te Mahau can support you with building your awareness of the changes, growing your understanding, implementing, and embedding and sustaining the changes. This will be a process of continuous improvement for your school over time.

The change process



Support material and services

In July 2023 Te Mahau will publish a toolkit which will include a sample planning and reporting process, guidance on each step and tools such as document templates.

You can view the initial draft version of this toolkit that we consulted on in March 2023 below:

[Draft Te Whakangārahu Ngātahi Toolkit for principals, boards and school staff](#)

From June – July we will be adding updates to our Schools' Planning and Reporting webpage. Please regularly check here for updates:

[Schools' Planning and Reporting webpage](#)

If you have any further questions, or if you would like support with your planning and reporting process, please get in touch with your local Te Mahau office. You can find contact details on our Local Ministry offices webpage here:

[Local Ministry offices webpage.](#)

Timeline for 2023

- ▷ Prepare for planning.
- ▷ Read the legislative requirements, including the new regulations when they are released (July 2023).
- ▷ Engage with your community to understand their priorities.
- ▷ Check you have documented who is in your community and identify the best ways to engage with them.
- ▷ Prepare your initial strategic plan for 2024–2025. (Note the first strategic plan under the new framework is for 2 years instead of 3 years to align with triennial board elections).
- ▷ Prepare your annual implementation plan for 2024 based on your strategic plan and what you have achieved in the previous years. Note that some of the information that you gather for this will also help form your annual report.
- ▷ It is good practice to let your community know what you heard during your engagement with them and how you have taken this into account.



Timeline for 2024 and beyond

2024

- » Finalise and publish your strategic plan on your school's website and send a link to your local Te Mahau office by 1 March 2024.
- » Finalise and publish your 2024 annual implementation plan on your school's website by 31 March 2024.
- » Publish your annual report for the 2023 year on your website and submit it to the Ministry using the Secure Data Portal by 31 May 2024.
- » Prepare your annual implementation plan for 2025 based on your strategic plan and what you have achieved in the previous years. Note that some of the information that you gather for this will also help form your annual report.
- » It is good practice to report back to your community regularly on your progress. This may be done in a variety of ways depending on what your community have asked for during your engagement with them.

2025

- » Finalise and publish your 2025 annual implementation plan on your school's website by 31 March 2025.
- » Publish your annual report for the 2024 year on your school's website and submit it to the Ministry using the Secure Data Portal by 31 May 2025.
- » Engage with your community and prepare your strategic plan for 2026-2028.
- » Prepare your annual implementation plan for 2026 based on your strategic plan and what you have achieved in the previous years. Note that some of the information that you gather for this will also help form your annual report.
- » It is good practice to report back to your community regularly on your progress. This may be done in a variety of ways depending on what your community have asked for during your engagement with them.

2026

- » Finalise and publish your 2026-2028 strategic plan on your school's website and send a link to your local Te Mahau office by 1 March 2026.
- » Finalise and publish your 2026 annual implementation plan on your school's website by 31 March 2026.
- » Publish your annual report for the 2025 year on your school's website and submit it to the Ministry using the Secure Data Portal by 31 May 2026.
- » Prepare your annual implementation plan for 2027 based on your strategic plan and what you have achieved in the previous years. Note that some of the information that you gather for this will also help form your annual report.
- » It is good practice to report back to your community regularly on your progress. This may be done in a variety of ways depending on what your community have asked for during your engagement with them.

Getting ready for change

The self-reflection statements on these pages are designed to help you prepare for leading your school through the planning and reporting changes.

Preparing for planning



Build Awareness

- » We are familiar with the changes in the Education and Training Act 2020 that replace school and kura charters with a three-year strategic plan and an annual implementation plan.
- » We know that the NEG's and NAG's no longer have effect and that these have mostly been moved to other areas of legislation.
- » We know that new regulations that set out the detailed requirements of the new framework will be finalised by July 2023.
- » We understand that our plans need to have particular regard to the National Education and Learning Priorities (NELP), give effect to Te Tiriti and support the implementation of the curriculum.
- » We know that we must publish all planning and reporting documents on an internet site.
- » We understand that our school board, leadership and staff will need multiple opportunities to explore, talk about and consider the change.



Grow understanding

- » We have good understanding of the changes and are identifying opportunities to strengthen our planning process.
- » We are reflecting on what our school needs to do to give effect to Te Tiriti o Waitangi.
- » We are exploring our school's context and what this means for our planning e.g., designated character or Māori or Pacific pathways within your school.
- » We are identifying ways to plan and report with particular regard to the NELP.
- » We understand the current curriculum requirements of our school or kura.
- » We are keeping up to date with changes proposed through the Curriculum Refresh and redesign processes.
- » We are prepared to publish our planning and reporting documents and have a website that is easily accessible to our community. We know that if we do not have a school website we can send our documents to the Ministry of Education to publish on the Education Counts website.
- » School or kura staff, leadership and board members are learning together and keeping dialogue open.

Understand your community



Build Awareness

- » We know that we will need to understand who is in our community and will need an ongoing process for working with tangata whenua, ākonga, whānau, the community and our planning and reporting cluster.



Grow understanding

- » We are identifying who we should target during our engagement on our strategic plan. This could include those that aren't present, participating or progressing to their potential.
- » We know the best ways to consult with our community to meet their specific needs.
- » We are gathering information that helps us understand and prepare for community engagement e.g., through community census data.
- » We are talking with tangata whenua, ākonga, whānau, the community, and our school or kura cluster about how we can work together in response to planning and reporting change.

Resources to help you get ready for change

Resources that may help with preparing for planning

- » New Zealand School Trustees Association (NZSTA) resources:

[NZSTA Te Tiriti O Waitangi Resource](#)

[NZSTA Resource Centre— Learning, Events & Online Courses](#)

[NZSTA Board Tools and Support Help for Boards](#)

- » National Education and Learning Priorities (NELP):

[The Statement of National Education and Learning Priorities \(NELP\) and the Tertiary Education Strategy \(TES\)](#)

- » Curriculum tools—local curriculum, assessment for learning, whānau engagement:

[The New Zealand Curriculum](#)

[Refreshing the New Zealand Curriculum](#)

[Te Whakahou i Te Mātauranga o Aotearoa](#)

[Te Marautanga o Aotearoa | Kauwhata Reo](#)

- » Te Mātaiaho Implementation supports:

[Draft Implementation Supports](#)

- » ERO's School Improvement Framework | Education Review Office (ero.govt.nz):

[School Improvement Framework](#)

- » Te Ara Huarau; the new approach to evaluation | Education Review Office (ero.govt.nz):

[Te Ara Huarau; the new approach to evaluation](#)

Resources that may help with understanding your community

- » Stats NZ website:

www.stats.govt.nz

- » ERO Self-reflection tool School Evaluation Indicators | Education Review Office (ero.govt.nz):

[School Evaluation Indicators](#)

- » NZSTA Resource Centre:

[NZSTA Resource Centre](#)

- » Local Iwi Education Plan.

- » Educationally Powerful Connections with Parents and Whānau (ERO, 2015) | Education Review Office (ero.govt.nz):

[Educationally Powerful Connections](#)

- » Building Genuine Learning Partnerships with Parents (ERO, 2018) | Education Review Office (ero.govt.nz):

[Building genuine learning partnerships with parents](#)





**Te Tāhuhu o
te Mātauranga**
Ministry of Education



**Te Kāwanatanga
o Aotearoa**
New Zealand Government