

**Waterlea School**  
DOCUMENTATION AND SELF REVIEW POLICY (NAG 2)  
NATIONAL STANDARDS POLICY (NAG 2A)  
ANNUAL CHARTER UPDATE POLICY (NAG 7)  
ANALYSIS of VARIANCE POLICY (NAG 8)

**RATIONALE:**

NAG 2: Maintaining effective documentation and self review processes promotes an effective school and enables continuous schooling improvement.

Our Charter shares our mission, vision, values and strategic goals which reflect the Governments National Education Guidelines, the New Zealand Curriculum and New Zealand's cultural diversity including the unique position of Maori. It outlines the Board's priorities to improve student learning, management of assets and human resources over 3 years and includes our annual goals, targets and expectations for student achievement. These provide a base against which the Board develops policies and practices and also assesses and reports its performance. The charter is a binding agreement between the Board and Ministry of Education (MOE).

NAG 2A: The Board reports against the National Standards as required.

NAG 7: The Charter is updated annually and is provided to the Secretary of Education within the expected timeframe.

NAG 8: An Analysis of Variance is provided to the Secretary of Education within the expected timeframe.

**PURPOSE:**

1. To comply with the reporting requirements of the Education Act 1989, its amendments and the Official Information Act.
2. To ensure that policies, guidelines, procedures and systems in the school are properly documented.
3. To provide a framework for reviewing all aspects of the school's operations.
4. To have a current charter that includes our vision, mission and goals which are reflections of our community's values and together these elements guide our work of improving student achievement.
5. To use the strategic plan to guide the development of an annual plan.
6. To annually review our performance against our goals and the National Standards and report any variance to the MOE.
7. To annually update our strategic direction.
8. To provide the Secretary of Education with our analysis of Variance

**NAG 2 DOCUMENTATION AND SELF REVIEW POLICY GUIDELINES**

With the principal and teaching staff:

1. Maintain an on-going programme of self review in relation to all policies, plans and programmes including evaluation of information on student achievement. Documents that assist this work are:
  - a. The school's Charter which includes 3 sections:
    - i. mission, vision and values
    - ii. strategic section
    - iii. annual section
  - b. The Board's Strategic Plan
  - c. The Board's Annual Timeline
  - d. BOT Calendar of Events
  - e. The school's curriculum and assessment schedule
  - f. The annual reporting schedule
  - g. Parent / whanau meetings minutes
  - h. Principal's reports
    - i. Progress on the annual plan
    - ii. Curriculum, self review, employment, asset management and health and safety reports
  - i. Board of Trustees Trusteeship Guidelines
  - j. Guidelines outlining the Schedule of Delegations
2. Consult with our community to develop a school charter and three year strategic plan that reflect community wishes and guide planning for curriculum, National Standards, assessment and staff professional development.
3. Compliance with NAGS 1- 8
  - a. The expectations for each NAG are outlined in both policy and procedures.
  - b. Review these as NAGs change.
4. To report to stakeholders of the school
  - a. Students and their parents on the achievement of individual students.
  - b. The school's community on the achievement of students as a whole and of groups identified through Nag 1 (iii) including the achievement of Maori students against the plans and targets referred to in NAG 1 (v)
  - c. Ministry of Education as required

**NAG 2A NATIONAL STANDARDS POLICY GUIDELINES**

- a. Report to students and their parents, in plain written language at least twice a year, on the student's progress and achievement in relation to National Standards.
- b. Annual report:
  - i. Where the privacy of individuals is not breached the Annual Report includes National Standards data broken down by the numbers and proportions of students at, above, below or well below National Standards, including by Māori, Pasifika, gender, and by year level and how students are progressing against National Standards as well as how they are achieving.
  - ii. Includes analysis of National Standards school-level data under the following three headings:
    1. School strengths and identified areas for improvement (note these could be split into two sections)

2. The basis for identifying areas for improvement
  3. Planned actions for lifting achievement.
- c. Is submitted, to the Secretary for Education, at the same time as the annual charter update (March 1<sup>st</sup>) and is included in the annual report in May.

**NAG 7 ANNUAL CHARTER UPDATE GUIDELINES**

1. Complete an annual update of the school's charter.
2. Provide the Secretary for Education with a copy of the updated school charter before 1 March of the relevant year.

**NAG 8 ANALYSIS of VARIANCE GUIDELINES**

1. Provide the Secretary for Education with a copy of our analysis of any variance between the school's performance and the relevant aims, objectives, directions, priorities, or targets set out in the school charter by March 1.

**Approval**

1. When the Board approved this Policy it agreed that no variations of this Policy or amendments to it can be made except with the unanimous approval of the Board.
2. As part of its approval the Board requires the Principal to circulate this policy to all staff, and for a copy to be included in the School Policy Folder, copies of which shall be available to all staff. The school policy folder shall also be made available to students and parents at their request. The Board requires that the Principal arrange for all new staff to be made familiar with this Policy and other policies approved by the Board.

**Actions:**

1. Annually:
  - (a) Review and update Charter and the Strategic Plan
  - (b) Write an Annual Plan to improve student progress and achievement
  - (c) Report the Analysis of Variance against the Annual plan
  - (d) Report against National Standards as required
  - (e) Approve annual curriculum and assessment plan and map out a reporting schedule that will reflect the years reporting activities so that the BOT are informed in a timely way on student achievement.
  - (f) Develop, approve and review school policies according to the BOT's Calendar of event.
  - (g) Send updated Charter, Strategic Plan, Annual Plan and annual report including the Analysis of Variance to the MOE within the expected timeframe
  - (h) Send annual account materials to auditors and MOE within the expected timeframes

**In order to fulfil the policy, the board and management have developed, and will regularly review, the following procedures associated with NAG 2 -Documentation and Self Review, NAG 2A - National Standards, NAG 7 - Annual Charter Update and NAG 8 - Analysis of Variance:**

Ratified by Board: \_\_\_\_\_

Chairperson - Signed for BOT

Date: \_\_\_\_\_

## **Waterlea School NAG 2 Procedures:**

*Strategic planning with community stakeholders is vital as it provides the school with a future direction that is community owned.*

*Self reflection is a prerequisite for self improvement—we value good performance, accountability, transparency, feedback and trust.*

### **NAG 2 DOCUMENTATION AND SELF REVIEW POLICY PROCEDURES:**

#### **1. Policies , guidelines and procedures:**

##### **a. The Board:**

- i. Writes policies, procedures, plans and programmes that state the intentions and actions the school will undertake to give effect to the National Education Guidelines and the National Administration Guidelines that comply with the legislation.
- ii. Reviews their policies, procedures, plans, programmes and student achievement in an on going programme of self review using the Waterlea Board of Trustees Annual Timeline and BOT Calendar and the Waterlea Reporting schedule.
- iii. Consults with the community of any significant changes to policies and procedures
- iv. Shares any changes with the community

##### **b. The Principal:**

- i. reports to the Board at BOT meetings on:
  1. the progress made on the annual goals.
  2. any changes to policies procedures
  3. the progress made on the Waterlea BOT Annual Timeline.
  4. On student achievement (level of learning at a single time) as per the Waterlea Reporting Schedule
  5. Teams share data on student achievement and teaching capability in monitoring meetings. These are followed by the Lead Team who scrutinizing the data further. Following these meetings a report with recommendations is written and presented to the Board.

#### **2. Charter, Strategic Plan and Annual Planning:**

##### **a. The Board:**

- i. Consults with the community in a timely way. The results from the consultation reaffirm existing or are shaped into new goals.
- ii. Updates the Strategic Section so that there are always 3 years of broad goals
- iii. The Chair signs off the Annual Plan, Annual Report and audited financial statements
- iv. on receiving Annual Plan monitoring information asks critical and challenging questions related to improvement using monitoring information being shared from the school. Examines what has been effective in supporting student learning. Also considers what questions does the data raise
- v. Informs the principal if they are not receiving the right or adequate information to make decisions.
- vi. Be clear about expectations for follow up by management

##### **b. The Management:**

- i. Set annual goals and targets for improving student outcomes following the Board's Strategic Plan:
  1. analyse and interpret the current year's data
  2. Align with the school's strategic goals (November for the next year).
  3. align with Government's priorities
  4. Goals and targets are based on rich evidence. From this baseline data priority groups are identified as those in the target group.
  5. The Annual Plan format follows the expectations for reporting (see below – Appendix 1)
  6. Present to Board for approval by November for the next year
  7. The annual goals:
    - a. Implemented through the year
    - b. Are monitored to determine areas for improvement throughout the year and reassessed if needed. Progress is reported to the Board on a regular basis throughout the year. Make these reports available to the community.
    - c. Are reviewed at the end of the year and reported in the Annual Report which is presented to the Board at the December meeting for approval. Data from the review is used as evidence to determine priorities and targets for the next year
  8. Progress on the Targets:
    - a. Reported to the Board as per the Reporting Schedule
    - b. Reported in the Annual Report
  9. The components of the Annual Report:

- a. Names of elected, appointed, selected and co-opted trustees and the date each goes out of office
  - b. The auditor's report
  - c. The Board's annual financial statements
  - d. Remuneration paid to trustees during the year
  - e. Remuneration paid to non trustees as committee members
  - f. The number of employees receiving remuneration of or over \$100,000
  - g. The total remuneration paid to the principal
10. Analysis of variance
11. National Standards requirements (see template below – Appendix 2):
- a. report school-level data under three headings:
    - i. school strengths and identified areas for improvement
    - ii. the basis for identifying areas for improvement
    - iii. planned actions for lifting achievement
  - b. the numbers and proportions of students at, above, below and well below the standards, including by Maori, Pasifika and gender (where this does not breach an individual's privacy)
  - c. how students are progressing against the Standards as well as how they are achieving (progress is the difference in achievement between two points in time)
3. Reporting to stakeholders:
- a. Students and their parents:
    - i. General communications include:
      - 1. Teacher Introduction letters
      - 2. Parent letters informing them if their child is on any Learning and Behaviour Support Programmes
      - 3. Newsletters and website
      - 4. Whanau Days ( twice a year)
      - 5. PTA notice board (regularly updated)
      - 6. BOT newsletter (each term)
      - 7. Media
      - 8. Parents followed up when absences and lateness are problematic firstly by the school. If the problem persists the truancy agency will be informed.
    - ii. Progress and achievement -reporting to students and their parents on individual student
      - 1. Student Led Conferences twice a year (See SLC procedures in separate folder)
      - 2. Portfolios – three times a year (includes a final report at end of year) providing evidence of progress and achievement at SLC and end of year.
  - b. Schools community on achievement of students:
    - i. Reports on school wide student achievement - available to families in school foyer
      - 1. School Charter
      - 2. BOT reports
      - 3. BOT Annual report
        - a. National Standards requirements (see below)
      - 4. ERO Reports
      - 5. Any requests from the public or media for reports that are legal public documents must be made available on request e.g. approved annual reports.
  - c. MOE:
    - i. School Charter sent to MOE in the timeframe expected by MOE
    - ii. Audited accounts by end of March – including an analysis of variance report on annual target/s
    - iii. Roll returns ( March & July)
    - iv. Other programmes e.g. Reading recovery data, Milestones for Professional Development within the timeframe expected.

#### **NAG 2A NATIONAL STANDARDS PROCEDURES**

- a. Time is spent on building positive relationship activities so that strong home school partnerships are fostered.
- b. Teachers make overall teacher judgments in maths, reading and written language in relation to National Standards on individual student progress and achievement. These are reported to students and their parents in plain language in writing twice a year using our portfolios and SLCs.
- c. Parents are invited to request a one on one interview with the teachers should they feel the need for it.
- d. Teachers enter National Standards data onto an electronic spreadsheet that is broken down by:
  - i. Trends and patterns for each year level and for groups of students

- ii. the numbers and proportions of students at, above, below or well below NS
- iii. Māori, Pasifika and other,
- iv. gender
- v. how students are progressing against National Standards
- e. Along with the spreadsheets and its analysis form part of the Annual Report which:
  - iii. Is submitted, to the Secretary for Education, at the same time as the annual charter update (March 1<sup>st</sup>) and is included in the annual report in May.
  - iv. The analysis of National Standards school-level data under the following three headings (where an individual's privacy is not breached):
    - 4. School strengths and identified areas for improvement (note these could be split into two sections)
    - 5. The basis for identifying areas for improvement
    - 6. Planned actions for lifting achievement.
- f. The principal's Board reports and the Annual Report have sufficient evidence:
  - i. To show the pace of progress
  - ii. To identify groups needing to have accelerated progress in order to be able to access the NZC and make expected progress.
  - iii. So that BOT members can challenge and critique the report and assist in the setting of targets
- g. These reports are available to the community. The Board invite members of the community to their meetings. Dates for these meetings are published in the newsletters.
- h. Targets:
  - i. Reflect high expectations for groups of students, with a particular focus on Māori students and on those at risk of not meeting the standards.
  - ii. Reflect the Governments priorities
  - iii. incorporate feedback from parents, families, and whānau about trends in school-wide data and Māori student achievement.
- i. The Board's Review process:
  - i. Individual members have sufficient knowledge of the NZC and the standards to be able to:
    - 1. discuss, critique, and challenge required reports on students' progress and achievement;
    - 2. review the effectiveness of school structures, processes, and practices in supporting students' cultural and learning needs, with a particular focus on students at risk of not meeting the standards.
  - ii. Understand the links between priorities for professional learning, the budget, the strategic and annual plans, and the principal's performance agreement. These all focus on ongoing improvement of student outcomes, using expectations from the NZC and the Standards as reference points.
  - iii. Considers the impact they have made to meet the requirements of reporting on the identified trends and patterns in the progress and achievement of students as a whole and of groups of students in relation to expectations from the NZC and the Standards, with a particular focus on Māori students and on students at risk of not meeting the Standards;
  - iv. Uses this information, along with in-depth consultation with key stakeholders to report in the Annual Report:

#### **NAG 7 ANNUAL CHARTER UPDATE PROCEDURES**

1. Updated Charter (see above NAG 2 point 2):
  - a. Through the Board's review process update the Charter
  - b. Sign off no later than the February Board meeting
  - c. Submit to MOE before March 1
  - d. Make available to the community
2. Submit 4 copies of the previous year's Annual Report to the MOE before May 31 including audited financial statements signed by the Chair.

#### **NAG 8 ANALYSIS of VARIANCE PROCEDURES**

1. The Analysis of Variance is submitted with the Annual Report by March 1
2. It provides an opportunity to consider:
  - a. Did we achieve our targets?
  - b. If not, why not?
  - c. What could we do differently to achieve the targets?
  - d. A way forward for the following year's Annual Plan

Appendix 1:

Waterlea School Annual Plan 201xxx

<b>Tasks/ Actions (What we plan to do)</b>	<b>Resources / Who</b>	<b>Monitoring/ Time Frame</b>	<b>Expected Outcomes (What we expect will happened)</b>	<b>Outcomes and Variance(record any reasons why did it not happen)</b>	<b>Evaluation (Next steps)</b>

Appendix 2:

**Waterlea School National Standards Data 201x**

**School number 1652:**

<b>NAG2A (b)(i) Areas of Strength</b>
National Standard Subject:
Discussion:
<b>NAG2A (b)(i) Areas for Improvement</b>
National Standard Subject:
Discussion:
<b>NAG2A (b)(ii) Basis for Identifying Areas for Improvement</b>
Discussion:
<b>NAG2A (b)(iii) Planned Actions for Lifting Achievement</b>
Discussion:
<b>Additional Information:</b>
<b>NAG2A (c) (i) and (ii)</b> Your Board is also required to report on National Standards and how students are progressing against the standards. Please use the electronic spreadsheet to complete this information. <a href="http://www.minedu.govt.nz/~media/MinEdu/Files/Boards/PlanningAndReporting/Planning/NationalStandardDataTemplateNov12.xls">http://www.minedu.govt.nz/~media/MinEdu/Files/Boards/PlanningAndReporting/Planning/NationalStandardDataTemplateNov12.xls</a>