Department of Education
GOVERNMENT OF WESTERN AUSTRALIA

Public education
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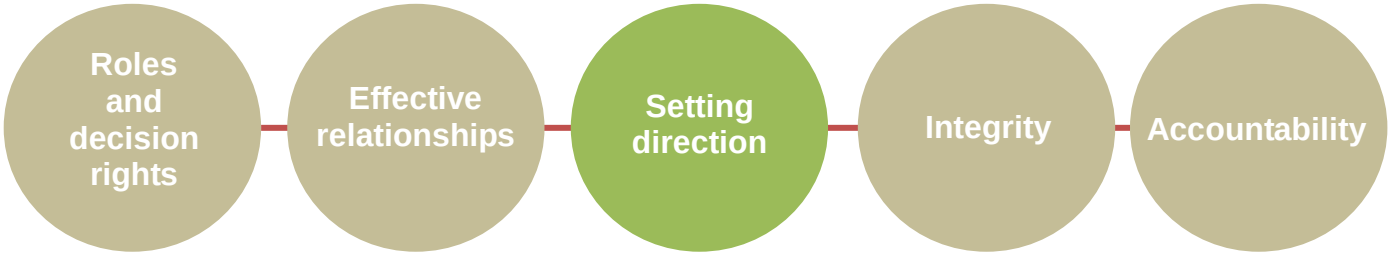
PUBLIC SCHOOL COUNCIL/BOARD TRAINING

D17/0558197

Module 3: School planning



In this module, you will learn about:

- identifying the long-term priorities and targets of the school
- planning to achieve targets
- reviewing budgets that support business/strategic planning
- developing a school plan.

A business/strategic plan

All principals are required to undertake school planning processes that include the development of a School Plan, operational planning and classroom planning. The Department of Education provides advice on what to include in the plan.

A business plan/strategic plan is a critical document for all schools. It is a public document that communicates the long-term strategic approach for the school. It includes:

- the school vision
- school beliefs and context
- references to system policies and directions
- an overview of school performance
- student improvement targets
- key areas of focus, major strategies, resources to achieve the student improvement targets
- evaluation measures and timeframes, including a provision for annual review.

Here are some excerpts from two school plans:

Who we are

Strategic Intent

Within the Health Promoting Schools Framework there are three key objectives.

1. **Inclusive Curriculum and Pedagogy**
   All students achieving to their potential through excellence in teaching and learning.
2. **Ethos and Learning Environment**
   Ensure all students feel safe, cared for, valued, and develop resilient young individuals.
3. **Partnerships**
   Working collaboratively with all stakeholders in the school and wider community to improve student outcomes.

Staff shared beliefs

The staff make decisions and develop strategies within the school based on the following shared beliefs:

- There is a need to develop the whole child - socially, academically, emotionally, creatively and physically.
- Resilience is an important life skill that needs to be developed and fostered in all.
- The learning environment needs to be safe, challenging and inclusive.
- Teaching and learning must be visible and enable reflection with quality feedback.
- Partnerships in learning are sought after and valued.
- High expectations are set academically and socially.
- Students learn best through the Gradual Release Model. (I do, we do, you do)
- Diversity is acknowledged, valued and celebrated.
- Proactive early intervention is more effective than reactive measures.

Example A: Primary School uses its Business Plan to promote its shared beliefs and to set out the strategic intent across three areas:

- Inclusive Curriculum and Pedagogy.
- Ethos and Learning Environment.
- Partnerships.

Example A: Primary School has identified achievement targets within each focus area and the strategies that will be implemented to reach the targets.

Example B:
Business Plan sets out four focus areas:

- Gifted and Talented Education.
- Academic Excellence.
- Excellence in Teaching and Learning.
- Safe and Caring School Culture.

ACADEMIC EXCELLENCE

Innovative, stimulating and rewarding education in a supportive learning environment produces outstanding students with a passion to excel academically across all curriculum areas.

STRATEGY	ACHIEVEMENT TARGETS
STUDENTS ACHIEVE ACADEMIC EXCELLENCE AND PERSONAL BEST	
• Develop challenging programs to match the Australian and Western Australian Curriculum linking Year 7 through to Year 12 in sequential structures that consolidate and build on prior learning. • Identify students' academic potential and students experiencing learning disadvantage or difference in Year 7 through to Year 12. Provide support to all students and raise awareness with teachers and parents. • Strive for excellence in NAPLAN. • Use NAPLAN to develop excellence in student learning.	• Consistent placement in the Top 20 of all WA schools and Top 5 of all WA public schools for Year 12 WACE, ATAR and non-ATAR results. • Placement in the Top 10 Schools for VET and Certificate II and III completion. • Attainment and completion of WACE above 95%. • Median ATAR above 85. • All Band 9 and 10 Year 9 NAPLAN students achieve over 65% in individual Year 12 WACE examinations. • Students who have completed the Academic Excellence Program should achieve a Year 12 ATAR above 80. • All measures of Year 7 and Year 9 NAPLAN for bands, averages and progress to be similar to or better than the Top 5 public schools in Western Australia.
RECOGNITION AND REWARD	
• Maintain and develop recognition and reward strategies for students to engage in self-directed and creative learning in areas of personal interest.	• Increase trends of students achieving College Swan Awards for academic achievement in all years and Year 12 School Curriculum and Standards Authority (SCSA) awards.

Within **Academic Excellence**, the Business Plan identifies targets and strategies under the areas:

- Students achieve academic excellence and personal best.
- Recognition and reward.

The Delivery and Performance Agreement (for Independent Public Schools) requires the principal to ensure:

- there is an effective business/strategic plan in place which includes the long-term strategic approach for achieving student improvement targets
- the plan describes key focus areas and strategies which will have maximum impact in lifting school performance.

The Delivery and Performance Agreement requires the plan must, at a minimum:

- run for the same length as the Delivery and Performance Agreement (at least three years)
- be endorsed by the board
- be signed by the chair
- be available to the school community via the school website or similar means
- contain information that describes:
  - the school's vision
  - the school's context
  - key focus areas/priorities for the school
  - student improvement targets related to the focus areas/priorities
  - strategies to achieve the targets.

Summary of school plan elements

Section	Contents
Vision	• The school's ethos, culture, aspirations and unique qualities.
Context	• The distinctive nature of the school community. • Factors that may have an impact on the school over the next three years such as local changes in the economy and population trends.
Student performance improvement targets	• Targets for student achievement (academic and non-academic).
Key focus areas and operational strategies	• Key focus areas to achieve the student performance improvement targets. • Operational strategies to achieve the student performance improvement targets.

See also page 1.

How to develop a school plan

Role of the principal

The principal is responsible for and leads the development of the plan and involves the council/board in the process. The principal is responsible for the development, implementation and outcomes of the plan based on a range of evidence about student outcomes (academic and non-academic).

Role of the council/board

The council/board plays a key role in:

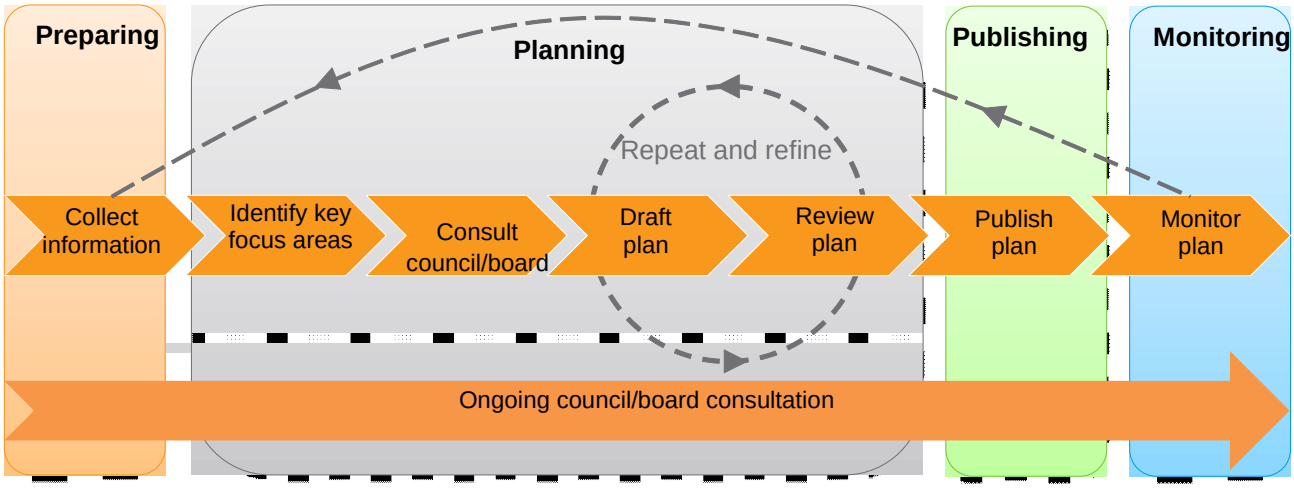
- working with the principal to establish the plan's objectives, priorities and directions, including giving insights into local community context, aspirations and history
- reviewing the plan
- monitoring the progress of the plan
- planning financial arrangements necessary to fund the objectives and priorities of the plan
- participating in the school review.

Planning process

The principal leads the development of the plan and involves the council/board in the process. It is important there is a preliminary planning meeting involving the principal and council/board to make sure key matters and expectations are raised early. The plan must align with the strategic directions and Department of Education and Australian and State Government requirements; and be consistent with the expectations and aspirations of the school community.

Setting student achievement targets too high or too low compared with community aspirations and national and state standards can cause tension between the school and community.

Phases for developing a school plan



Preparing

Before starting to plan, the following are important to take into account:

- the school's Delivery and Performance Agreement (for Independent Public Schools only), including the start and end dates as these dates form the minimum term of the plan, the school review process and timeline.
- existing documentation on the school's vision, values and history.
- current and historical school performance data including academic and non-academic data such as NAPLAN results, student attendance, staff retention, awards received, school reviews.
- relevant information about the school community including demographic and economic data – the local shire/council and Australian Bureau of Statistics websites are good places to start.

Planning

The school community (educational professionals, parents and others) should feel ownership of the plan.

The principal should take steps to take into account diverse opinions when developing the plan. This may include consultations, surveys and workshops with staff, students and parents.

It is important to be clear at the outset about the improvement opportunities and challenges the school believes it faces as the plan needs to focus on these.

Strategies to achieve the targets set out in the plan will:

- be aligned with the Department of Education strategies and priorities
- be underpinned by sound evidence-based strategies considered effective in improving student outcomes
- align with the strengths and opportunities at the school
- be achievable given the resources available to the school

- identify where school capabilities might need to be strengthened for the plan to succeed.

Strategies should be described in sufficient detail to enable them to be implemented and evaluated. As the principal or delegate drafts the plan, they should seek ongoing feedback and input from the council/board (and other stakeholders as appropriate).

Publishing

While the plan is a working document of the school, it should be made available to the school community. This may be via hard copy, online or both.

Monitoring

The school is responsible for implementation of the plan and ongoing monitoring of its progress. The principal reports on progress to the council/board to enable it to monitor whether the plan's targets are being achieved.

Changes and updates to the plan

The school may update the plan in response to significant changes in the internal and/or external operating environment (for example, changing enrolment patterns, major changes to staffing). If changes are to be made to specific goals and/or targets, a transparent and considered approach needs to be adopted.

Any significant changes to the plan must be presented to, and reviewed by, the council/board. The council/board meeting minutes would reflect that the specific changes were discussed, council/board members understood the rationale for the changes, and the council/board agreed to the changes.

Planning checklist

During the planning process council/board members might consider these questions:

About our school

- ☑ What is our school's purpose and objectives?
- ☑ What are our strengths and weaknesses?
- ☑ How does the performance of our students compare with similar schools?

Our priorities

- ☑ What does the evidence suggest are the most important priorities for our children's education?
- ☑ Which of these should receive special attention over the next few years?
- ☑ What will we need to do to achieve our objectives?
- ☑ How will we know if we have achieved our objectives?
- ☑ Are our parents, staff and students aware of the school's objectives, priorities and policies?

Our environment and our community

- ☑ What are the Department of Education priorities?
- ☑ Does the plan reflect the distinctiveness of the local community?
- ☑ Does the school need to gather further information or seek additional professional advice?
- ☑ Is our community changing in terms of demographic or other trends, and if so, how will this affect the school?

Our council/board

- ☑ What assistance does the principal provide to council/board members to ensure they are sufficiently informed and skilled to take an active role in school planning?
- ☑ Do we need to attract or co-opt new members to support the planning process?

School budget

Schools prepare an annual budget before the school year commences to manage the income and expenses during the year, and evaluate performance at the end of the year.

The principal and staff plan and administer the budget. The principal provides information to help the council/board to understand the financial position of the school.

The council/board reviews the budget, with particular consideration to those parts of the budget that relate to the focus areas/priorities of the plan.

The council/board is not responsible for developing the annual budget. However, it can:

- ask the principal questions about how the school is managing its money to deliver the priorities in the plan
- expect to see a clear links between the budget and the priorities in the plan
- seek to understand key issues related to financial management of the school
- understand the risks the school faces and any budget implications (see Module 5 for more information about risk management).

The council/board does not make investment decisions on behalf of the school.

Tips for understanding a public school budget

Budget checklist

Questions the council/board might consider when reviewing the school budget:

- ☑ What are the current sources of income for the school (e.g. grants, charges, voluntary contributions, hire of facilities, other)?
- ☑ Does the budget align with the priorities and directions included in the school plan?

Contributions, charges and fees

As the council/board must approve school fees, charges and contributions, it is important for it to understand the breakdown and their purpose.

- ☑ What are the key components (that is, are families given information about how these were determined)?
- ☑ What will the money be spent on?
- ☑ Are requested amounts appropriate given the socioeconomic status of families?
- ☑ Do the requested amounts comply with legislation and Department of Education policy?
- ☑ Does the school have procedures for collecting charges and contributions?

Charges for optional education experiences

- ☑ Are there extra cost components (such as excursions or resources)?
- ☑ How will the extra cost components be identified?
- ☑ Are the extra cost options reasonable?
- ☑ Can the course/program be run if parents don't pay?
- ☑ How will the school deal with non-payment?
- ☑ Does the school have funds to cover costs for students who are unable to pay?
- ☑ What can we expect parents to provide?
- ☑ Are these expectations appropriate given the socioeconomic status of our families?

Sponsorship and advertising

There are important questions that the council/board should ask when considering possible sponsorships.

- ☑ Does the sponsorship comply with the Department of Education's sponsorship and advertising policies?
- ☑ What are the benefits of the sponsorship arrangement for students at the school?
- ☑ What are the consequences if we do/do not enter this agreement?
- ☑ What are the benefits to the sponsor?
- ☑ What are the expectations of both parties?
- ☑ What is the duration of the agreement?
- ☑ What is the impact (costs/benefit) on students, teachers, parents and Department of Education of the sponsorship arrangement?
- ☑ Are there any reputational or other risks associated with this sponsorship opportunity?