

Preparing for school planning and reporting changes

Information for School leaders

School planning and reporting underpins all work that schools do. This helps boards and schools identify priorities, take action to improve outcomes, and demonstrate the progress they are making for students.

School planning and reporting regulations are being updated to align with recent changes to the Education and Training Act 2020 and Government priorities. The intended regulation changes would need to be considered in your next strategic plan, which is effective from 1 January 2027.

This information supports your board to prepare for these intended changes to regulations.

KEY DATES

Term 3 2026	Consult with your school community and start to develop your strategic plan.
Term 4 2026	Continue development of your strategic plan. Review your draft strategic plan against the published regulations and approve.
1 Jan 2027	New strategic plan comes into effect.
1 Mar 2027	Strategic plan must be submitted to the Ministry and published online.
31 Mar 2027	Annual implementation plan must be published online.
31 May 2027	Annual report must be submitted to the Ministry and published online.





1. Understand the new requirements

The intended changes to the school planning and reporting regulations aim to strengthen the focus on educational achievement and simplify some existing requirements.

We expect the finalised regulations to be published by the start of term 4. We will let you know when this happens so you can ensure your strategic plan meets the new regulations.

What is changing?

It is intended your board would now need to meet the following school planning and reporting requirements.

In your strategic plan

- › Include a **minimum of three** strategic goals, developed in consultation with the school community, for meeting the paramount and supporting objectives.
- › Include **at least one** goal on educational achievement that addresses **one or more** of reading, writing and mathematics, or pānui, tuhituhi, and pāngarau.
- › It is **no longer a requirement** to include information about how your strategic goals link to any relevant national education strategies or plans. However, you may still include this if it is relevant to your school's plan.

In your annual report

- › Include a general assessment of how your school's strategies have contributed to the educational progress of students whose needs have not yet been well met, including how your school is supporting students not meeting curriculum expectations.
- › Include any actions you have taken in response to any Education Review Office (ERO) improvement actions, including a decision to take no action, and why.

In all of your planning and reporting documents

- › For any educational achievement goal, use targets, measures, and reporting that are informed by your school's judgement about student results from any relevant specific assessment tools¹, including the SMART tool or Progressive Achievement Tests (PAT).
- › For other strategic goals, you may use your own targets, evidence and evaluation methods.
- › You may also use qualification system data alongside curriculum-based information where appropriate, when planning for and reporting on the performance and achievement of senior secondary students.

What is staying the same

Aside from the intended changes, the current requirements in the Education (School Planning and Reporting) Regulations 2023 continue to apply:

<https://www.legislation.govt.nz/secondary-legislation/pco-drafted/2023/155/en/latest/#LMS858842>

¹ Set out in statements made by the Minister of Education under section 90 of the Education and Training Act.



2. Consult and develop your strategic plan

Your strategic plan effective from 1 January 2027 will be in place for two years (2027-2028). You will then need to develop a new, three-year strategic plan effective from 1 January 2029².

Consult with your school community

Engage with students, whānau, staff and your wider school community to understand their priorities, needs and aspirations for student success. Community engagement helps ensure your strategic goals reflect the needs of your students and your local context.

Gather and use information

Use a range of information to inform your strategic plan, including:

- › Student achievement information and assessment data.
- › Attendance, engagement and wellbeing information.
- › Findings from your annual report and previous planning documents.
- › Feedback from your school community.

Develop your strategic plan

The intended regulations would require your strategic plan to include a minimum of three strategic goals, including at least one educational achievement goal focused on reading, writing and mathematics or pānui, tuhituhi and pāngarau.

When developing your strategic plan:

- › Identify your strategic goals and decide how they will be resourced and achieved.
- › Determine specific strategies to improve outcomes for all students, including students whose needs have not yet been well met.
- › Decide what success looks like and how you will measure progress towards your goal.

You can check back with your school community to refine your plan as many times as you need.

² The strategic plan effective from 1 January 2027 will be in place for two years, to realign strategic planning timeframes with the board triennial election cycle.

3. Review and approve your strategic plan



Review your draft strategic plan

Once the final regulations are published, check that your draft strategic plan meets all legislative requirements and make any necessary updates before board approval.

Approve your plan

Your board must approve your strategic plan. The approved plan will guide your school's direction for 2027-2028 and will provide the basis for your annual implementation plans.

Before your board approves the plan check that it:

- › Includes a minimum of **three strategic goals**.
- › Includes at least **one educational achievement goal** for one or more of reading, writing and mathematics or panui, tuhituhi and pāngarau.
- › Is informed by consultation with your school community.
- › Uses measures informed by your school's judgement about student results from relevant specified assessment tools (including the SMART tool and PAT) for your educational achievement goals.
- › Meets the requirements of the final regulations once they are published.



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4. Publish and submit your documents



Once approved, publish your strategic plan (and your annual implementation plan and annual report when due) on your school's website. If your school does not have a website, the Ministry can publish your planning and reporting documents on the Education Counts website.

You also need to submit your approved strategic plan (and annual report when due) to the Ministry using the **School Planning and Reporting Application**: <https://applications.education.govt.nz/school-planning-and-reporting-submission>

See **Key Dates** on page 1 for the due dates for publishing and submitting.



Further information and support

Templates and examples to help you develop your plans and reports will be available soon. They will be shared through the School Leaders Bulletin and on the webpage.

Please visit our **School Planning and Reporting** webpage for further information: <https://www.education.govt.nz/education-professionals/schools-year-0-13/administration-and-management/school-planning-and-reporting-framework>

or contact your Ministry of Education regional office:
<https://www.education.govt.nz/our-work/about-us/contact-us/regional-offices>

Support for your board is also available from GovHub – School Board Services on 0800 782 435 or govadvice@govhub.org.nz.