

FORDELL SCHOOL

ANNUAL REPORT

FOR THE YEAR ENDED 31 DECEMBER 2022

School Directory

Ministry Number: 2357

Principal: Yvette Moorhouse

School Address: Budge Street

School Postal Address: Budge Street RD 2, Whanganui, 4572

School Phone: 06 342 7828

School Email: officeadmin@fordell.school.nz

Accountant / Service Provider:

Education } Services.
Dedicated to your school

FORDELL SCHOOL

Annual Report - For the year ended 31 December 2022

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Fordell School

Statement of Responsibility

For the year ended 31 December 2022

The Board accepts responsibility for the preparation of the annual financial statements and the judgements used in these financial statements.

The management (including the principal and others as directed by the Board) accepts responsibility for establishing and maintaining a system of internal controls designed to provide reasonable assurance as to the integrity and reliability of the school's financial reporting.

It is the opinion of the Board and management that the annual financial statements for the financial year ended 31 December 2022 fairly reflects the financial position and operations of the school.

The School's 2022 financial statements are authorised for issue by the Board.

Kelly Glasgow

Full Name of Presiding Member

K Glasgow

Signature of Presiding Member

Date: 18/5/2023

Yvette Moorhouse

Full Name of Principal

Y Moorhouse

Signature of Principal

Date: 18/5/2023

Fordell School

Statement of Comprehensive Revenue and Expense

For the year ended 31 December 2022

| | | 2022 | 2022 | 2021 |
|---|-------|-----------|-------------|-----------|
| | Notes | Actual | Budget | Actual |
| | | \$ | (Unaudited) | \$ |
| | | | \$ | |
| Revenue | | | | |
| Government Grants | 2 | 1,077,616 | 900,850 | 987,680 |
| Locally Raised Funds | 3 | 31,979 | 35,000 | 50,559 |
| Interest Income | | 3,807 | 500 | 2,070 |
| Gain on Sale of Property, Plant and Equipment | | - | - | 261 |
| Other Revenue | | - | - | 435 |
| | | 1,113,402 | 936,350 | 1,041,005 |
| Expenses | | | | |
| Locally Raised Funds | 3 | 12,820 | 5,800 | 19,728 |
| Learning Resources | 4 | 776,339 | 674,765 | 714,913 |
| Administration | 5 | 101,776 | 102,862 | 105,968 |
| Finance | | 1,033 | 370 | 404 |
| Property | 6 | 158,418 | 152,869 | 148,524 |
| Loss on Disposal of Property, Plant and Equipment | 11 | 8,906 | - | - |
| | | 1,059,292 | 936,666 | 989,537 |
| Net Surplus / (Deficit) for the year | | 54,110 | (316) | 51,468 |
| Other Comprehensive Revenue and Expense | | - | - | - |
| Total Comprehensive Revenue and Expense for the Year | | 54,110 | (316) | 51,468 |

The above Statement of Comprehensive Revenue and Expense should be read in conjunction with the accompanying notes which form part of these financial statements.

Fordell School

Statement of Changes in Net Assets/Equity

For the year ended 31 December 2022

| | Notes | 2022 Actual \$ | 2022 Budget (Unaudited) \$ | 2021 Actual \$ |
|--|-------|----------------------|-------------------------------------|----------------------|
| Equity at 1 January | | 691,356 | 634,511 | 645,849 |
| Total comprehensive revenue and expense for the year | | 54,110 | (316) | 51,468 |
| Contributions from the Ministry of Education | | - | - | 10,759 |
| Contribution - Furniture and Equipment Grant | | - | - | (16,720) |
| Board Contribution to Capital Project | | - | - | |
| Equity at 31 December | | 745,466 | 634,195 | 691,356 |
| Accumulated comprehensive revenue and expense | | 745,466 | 634,195 | 691,356 |
| Equity at 31 December | | 745,466 | 634,195 | 691,356 |

The above Statement of Changes in Net Assets/Equity should be read in conjunction with the accompanying notes which form part of these financial statements.

Fordell School

Statement of Financial Position

As at 31 December 2022

| | | 2022 | 2022 | 2021 |
|--|-------|--------------|-----------------------------|--------------|
| | Notes | Actual \$ | Budget (Unaudited) \$ | Actual \$ |
| Current Assets | | | | |
| Cash and Cash Equivalents | 7 | 585,930 | 367,401 | 379,991 |
| Accounts Receivable | 8 | 59,920 | 57,517 | 53,023 |
| GST Receivable | | - | 28,249 | - |
| Prepayments | | 6,641 | 4,095 | 3,911 |
| Inventories | 9 | 1,275 | 763 | 1,095 |
| Investments | 10 | - | 140,752 | 142,053 |
| | | 653,766 | 598,777 | 580,073 |
| Current Liabilities | | | | |
| GST Payable | | 10,076 | - | 9,962 |
| Accounts Payable | 12 | 66,515 | 129,294 | 63,922 |
| Revenue Received in Advance | 13 | 3,175 | 2,846 | 2,970 |
| Provision for Cyclical Maintenance | 14 | - | 1,658 | - |
| Finance Lease Liability | 15 | 4,551 | 3,902 | 2,632 |
| Funds held in Trust | 16 | 1,233 | 1,233 | 1,233 |
| Funds held for Capital Works Projects | 17 | 25,905 | - | - |
| | | 111,455 | 138,933 | 80,719 |
| Working Capital Surplus/(Deficit) | | 542,311 | 459,844 | 499,354 |
| Non-current Assets | | | | |
| Property, Plant and Equipment | 11 | 226,470 | 195,948 | 202,444 |
| Funds Held in Trust | | 13,339 | 13,339 | 13,339 |
| | | 239,809 | 209,287 | 215,783 |
| Non-current Liabilities | | | | |
| Provision for Cyclical Maintenance | 14 | 28,503 | 33,608 | 21,800 |
| Finance Lease Liability | 15 | 8,151 | 1,328 | 1,981 |
| | | 36,654 | 34,936 | 23,781 |
| Net Assets | | 745,466 | 634,195 | 691,356 |
| Equity | | 745,466 | 634,195 | 691,356 |

The above Statement of Financial Position should be read in conjunction with the accompanying notes which form part of these financial statements.

Fordell School
Statement of Cash Flows
For the year ended 31 December 2022

| | | 2022 | 2022 | 2021 |
|--|----------|----------------|-----------------------------|-----------------|
| | Note | Actual \$ | Budget (Unaudited) \$ | Actual \$ |
| Cash flows from Operating Activities | | | | |
| Government Grants | | 310,938 | 237,182 | 278,712 |
| Locally Raised Funds | | 30,212 | 35,000 | 50,404 |
| Goods and Services Tax (net) | | 114 | - | 38,211 |
| Payments to Employees | | (112,273) | (92,287) | (86,268) |
| Payments to Suppliers | | (139,157) | (215,024) | (163,786) |
| Interest Paid | | (1,033) | (370) | (404) |
| Interest Received | | 4,015 | 500 | 2,038 |
| Net cash from/(to) Operating Activities | | 92,816 | (34,999) | 118,907 |
| Cash flows from Investing Activities | | | | |
| Proceeds from Sale of Property Plant & Equipment (and Intangibles) | | - | - | 261 |
| Purchase of Property Plant & Equipment (and Intangibles) | | (51,663) | (37,000) | (64,591) |
| Purchase of Investments | | - | - | (1,301) |
| Proceeds from Sale of Investments | | 142,053 | - | - |
| Net cash from/(to) Investing Activities | | 90,390 | (37,000) | (65,631) |
| Cash flows from Financing Activities | | | | |
| Furniture and Equipment Grant | | - | - | 1,892 |
| Owners Contributions | | - | - | (16,720) |
| Finance Lease Payments | | (3,172) | (3,215) | (3,127) |
| Funds Administered on Behalf of Third Parties | | 25,905 | - | (97,945) |
| Net cash from/(to) Financing Activities | | 22,733 | (3,215) | (115,900) |
| Net increase/(decrease) in cash and cash equivalents | | 205,939 | (75,214) | (62,624) |
| Cash and cash equivalents at the beginning of the year | 7 | 379,991 | 442,615 | 442,615 |
| Cash and cash equivalents at the end of the year | 7 | 585,930 | 367,401 | 379,991 |

The Statement of Cash Flows records only those cash flows directly within the control of the School. This means centrally funded teachers' salaries and the use of land and buildings grant and expense have been excluded.

The above Statement of Cash Flows should be read in conjunction with the accompanying notes which form part of these financial statements.

Fordell School

Notes to the Financial Statements

For the year ended 31 December 2022

1. Statement of Accounting Policies

a) Reporting Entity

Fordell School (the School) is a Crown entity as specified in the Crown Entities Act 2004 and a school as described in the Education and Training Act 2020. The Board is of the view that the School is a public benefit entity for financial reporting purposes.

b) Basis of Preparation

Reporting Period

The financial statements have been prepared for the period 1 January 2022 to 31 December 2022 and in accordance with the requirements of the Education and Training Act 2020.

Basis of Preparation

The financial statements have been prepared on a going concern basis, and the accounting policies have been consistently applied throughout the period.

Financial Reporting Standards Applied

The Education and Training Act 2020 requires the School, as a Crown entity, to prepare financial statements in accordance with generally accepted accounting practice. The financial statements have been prepared in accordance with generally accepted accounting practice in New Zealand, applying Public Sector Public Benefit Entity (PBE) Standards Reduced Disclosure Regime as appropriate to public benefit entities that qualify for Tier 2 reporting. The school is considered a Public Benefit Entity as it meets the criteria specified as 'having a primary objective to provide goods and/or services for community or social benefit and where any equity has been provided with a view to supporting that primary objective rather than for financial return to equity holders'.

PBE Accounting Standards Reduced Disclosure Regime

The School qualifies for Tier 2 as the school is not publicly accountable and is not considered large as it falls below the expense threshold of \$30 million per year. All relevant reduced disclosure concessions have been taken.

Measurement Base

The financial statements are prepared on the historical cost basis unless otherwise noted in a specific accounting policy.

Presentation Currency

These financial statements are presented in New Zealand dollars, rounded to the nearest dollar.

Specific Accounting Policies

The accounting policies used in the preparation of these financial statements are set out below.

Critical Accounting Estimates And Assumptions

The preparation of financial statements requires management to make judgements, estimates and assumptions that affect the application of accounting policies and the reported amounts of assets, liabilities, revenue and expenses. Actual results may differ from these estimates.

Estimates and underlying assumptions are reviewed on an ongoing basis. Revisions to accounting estimates are recognised in the period in which the estimate is revised and in any future periods affected.

Cyclical maintenance

A school recognises its obligation to maintain the Ministry's buildings in a good state of repair as a provision for cyclical maintenance. This provision relates mainly to the painting of the school buildings. The estimate is based on the school's best estimate of the cost of painting the school and when the school is required to be painted, based on an assessment of the school's condition. During the year, the Board assesses the reasonableness of its painting maintenance plan on which the provision is based. Cyclical maintenance is disclosed at note 14.



Useful lives of property, plant and equipment

The School reviews the estimated useful lives of property, plant and equipment at the end of each reporting date. The School believes that the estimated useful lives of the property, plant and equipment as disclosed in the significant accounting policies are appropriate to the nature of the property, plant and equipment at reporting date. Property, plant and equipment is disclosed at note 11.

Critical Judgements in applying accounting policies

Management has exercised the following critical judgements in applying accounting policies:

Classification of leases

Determining whether a lease is a finance lease or an operating lease requires judgement as to whether the lease transfers substantially all the risks and rewards of ownership to the school. A lease is classified as a finance lease if it transfers substantially all risks and rewards incidental to ownership of an underlying asset to the lessee. In contrast, an operating lease is a lease that does not transfer substantially all the risks and rewards incidental to ownership of an asset to the lessee. Judgement is required on various aspects that include, but are not limited to, the fair value of the leased asset, the economic life of the leased asset, whether or not to include renewal options in the lease term, and determining an appropriate discount rate to calculate the present value of the minimum lease payments. Classification as a finance lease means the asset is recognised in the statement of financial position as property, plant, and equipment, whereas for an operating lease no such asset is recognised. Finance lease liability disclosures are contained in note 15. Future operating lease commitments are disclosed in note 22b.

Recognition of grants

The School reviews the grants monies received at the end of each reporting period and whether any require a provision to carry forward amounts unspent. The School believes all grants received have been appropriately recognised as a liability if required. Government grants are disclosed at note 2.

c) Revenue Recognition

Government Grants

The school receives funding from the Ministry of Education. The following are the main types of funding that the School receives.

Operational grants are recorded as revenue when the School has the rights to the funding, which is in the year that the funding is received.

Teachers salaries grants are recorded as revenue when the School has the rights to the funding in the salary period they relate to. The grants are not received in cash by the School and are paid directly to teachers by the Ministry of Education.

Other Ministry Grants for directly funded programs are recorded as revenue when the School has the rights to the funding in the period they relate to. The grants are not received in cash by the School and are paid directly by the Ministry of Education.

The property from which the School operates is owned by the Crown and managed by the Ministry of Education on behalf of the Crown. Grants for the use of land and buildings are not received in cash by the School as they equate to the deemed expense for using the land and buildings which are owned by the Crown. The School's use of the land and buildings as occupant is based on a property occupancy document as gazetted by the Ministry. The expense is based on an assumed market rental yield on the value of land and buildings as used for rating purposes.

This is a non-cash revenue that is offset by a non-cash expense. The use of land and buildings grants and associated expenditure are recorded in the period the School uses the land and buildings.

Other Grants where conditions exist

Other grants are recorded as revenue when the School has the rights to the funding, unless there are unfulfilled conditions attached to the grant, in which case the amount relating to the unfulfilled conditions is recognised as a liability and released to revenue as the conditions are fulfilled.

Donations, Gifts and Bequests

Donations, gifts and bequests are recognised as an asset and revenue when the right to receive funding or the asset has been established unless there is an obligation to return funds if conditions are not met. If conditions are not met funding is recognised as revenue in advance and recognised as revenue when conditions are satisfied.

Interest Revenue

Interest Revenue earned on cash and cash equivalents and investments is recorded as revenue in the period it is earned.

d) Operating Lease Payments

Payments made under operating leases are recognised in the Statement of Comprehensive Revenue and Expense on a straight line basis over the term of the lease.

e) Finance Lease Payments

Finance lease payments are apportioned between the finance charge and the reduction of the outstanding liability. The finance charge is allocated to each period during the lease term on an effective interest basis.

f) Cash and Cash Equivalents

Cash and cash equivalents include cash on hand, bank balances, deposits held at call with banks, and other short term highly liquid investments with original maturities of 90 days or less, and bank overdrafts. The carrying amount of cash and cash equivalents represent fair value.

g) Accounts Receivable

Short-term receivables are recorded at the amount due, less an allowance for expected credit losses (uncollectable debts). The schools receivables are largely made up of funding from the Ministry of Education, therefore the level of uncollectable debts is not considered to be material. However, short-term receivables are written off when there is no reasonable expectation of recovery.

h) Inventories

Inventories are consumable items held for sale and comprised of stationery and school uniforms. They are stated at the lower of cost and net realisable value. Cost is determined on a first in, first out basis. Net realisable value is the estimated selling price in the ordinary course of activities less the estimated costs necessary to make the sale. Any write down from cost to net realisable value is recorded as an expense in the Statement of Comprehensive Revenue and Expense in the period of the write down.

i) Investments

Bank term deposits are initially measured at the amount invested. Interest is subsequently accrued and added to the investment balance. A loss allowance for expected credit losses is recognised if the estimated loss allowance is not trivial.

j) Property, Plant and Equipment

Land and buildings owned by the Crown are excluded from these financial statements. The Board's use of the land and buildings as 'occupant' is based on a property occupancy document.

Improvements (funded by the Board) to buildings owned by the Crown or directly by the board are recorded at cost, less accumulated depreciation and impairment losses.

Property, plant and equipment are recorded at cost or, in the case of donated assets, fair value at the date of receipt, less accumulated depreciation and impairment losses. Cost or fair value as the case may be, includes those costs that relate directly to bringing the asset to the location where it will be used and making sure it is in the appropriate condition for its intended use.

Gains and losses on disposals (i.e. sold or given away) are determined by comparing the proceeds received with the carrying amounts (i.e. the book value). The gain or loss arising from the disposal of an item of property, plant and equipment is recognised in the Statement of Comprehensive Revenue and Expense.

Finance Leases

A finance lease transfers to the lessee substantially all the risks and rewards incidental to ownership of an asset, whether or not title is eventually transferred. At the start of the lease term, finance leases are recognised as assets and liabilities in the Statement of Financial Position at the lower of the fair value of the leased asset or the present value of the minimum lease payments. The finance charge is charged to the surplus or deficit over the lease period so as to produce a constant periodic rate of interest on the remaining balance of the liability. The amount recognised as an asset is depreciated over its useful life. If there is no reasonable certainty whether the school will obtain ownership at the end of the lease term, the asset is fully depreciated over the shorter of the lease term and its useful life.

Depreciation

Property, plant and equipment except for library resources are depreciated over their estimated useful lives on a straight line basis. Library resources are depreciated on a diminishing value basis. Depreciation of all assets is reported in the Statement of Comprehensive Revenue and Expense.

The estimated useful lives of the assets are:

| | |
|--|---------------|
| Building Improvements | 20-40 years |
| Furniture and Equipment | 5-10 years |
| Information and Communication Technology | 5 years |
| Library Resources | 8 years DV |
| Leased assets held under a Finance Lease | Term of Lease |

k) Intangible Assets

Software costs

Computer software acquired by the School are capitalised on the basis of the costs incurred to acquire and bring to use the specific software. Costs associated with subsequent maintenance and research expenditure are recognised as an expense in the Statement of Comprehensive Revenue and Expense when incurred.

The carrying value of software is amortised on a straight line basis over its useful life. The useful life of software is estimated as three years. The amortisation charge for each period and any impairment loss is recorded in the Statement of Comprehensive Revenue and Expense.

l) Impairment of property, plant, and equipment and intangible assets

The school does not hold any cash generating assets. Assets are considered cash generating where their primary objective is to generate a commercial return.

Non cash generating assets

Property, plant, and equipment and intangible assets held at cost that have a finite useful life are reviewed for impairment whenever events or changes in circumstances indicate that the carrying amount may not be recoverable. If such indication exists, the School estimates the asset's recoverable service amount. An impairment loss is recognised for the amount by which the asset's carrying amount exceeds its recoverable service amount. The recoverable service amount is the higher of an asset's fair value less costs to sell and value in use.

Value in use is determined using an approach based on either a depreciated replacement cost approach, restoration cost approach, or a service units approach. The most appropriate approach used to measure value in use depends on the nature of the impairment and availability of information.

In determining fair value less costs to sell the school engages an independent valuer to assess market value based on the best available information. The valuation is based on a comparison to recent market transactions.

If an asset's carrying amount exceeds its recoverable service amount, the asset is regarded as impaired and the carrying amount is written down to the recoverable amount. The total impairment loss is recognised in the surplus or deficit.

The reversal of an impairment loss is recognised in the surplus or deficit. A previously recognised impairment loss is reversed only if there has been a change in the assumptions used to determine the asset's recoverable service amount since the last impairment loss was recognised.

m) Accounts Payable

Accounts Payable represents liabilities for goods and services provided to the School prior to the end of the financial year which are unpaid. Accounts Payable are recorded at the amount of cash required to settle those liabilities. The amounts are unsecured and are usually paid within 30 days of recognition.

n) Employee Entitlements

Short-term employee entitlements

Employee entitlements that are expected to be settled within 12 months after the end of the reporting period in which the employees provide the related service are measured based on accrued entitlements at current rates of pay. These include salaries and wages accrued up to balance date, annual leave earned, by non teaching staff, to but not yet taken at balance date.

Long-term employee entitlements

Employee benefits that are not expected to be settled wholly before 12 months after the end of the reporting period in which the employee provides the related service, such as retirement and long service leave, have been calculated on an actuarial basis.

The calculations are based on the likely future entitlements accruing to employees, based on years of service, years to entitlement, the likelihood that employees will reach the point of entitlement, and contractual entitlement information, and the present value of the estimated future cash flows. Remeasurements are recognised in surplus or deficit in the period in which they arise.

o) Revenue Received in Advance

Revenue received in advance relates to fees received from students and grants received where there are unfulfilled obligations for the School to provide services in the future. The fees are recorded as revenue as the obligations are fulfilled and the fees earned.

The School holds sufficient funds to enable the refund of unearned fees in relation to students, should the School be unable to provide the services to which they relate.

p) Funds Held in Trust

Funds are held in trust where they have been received by the School for a specified purpose, or are being held on behalf of a third party and these transactions are not recorded in the Statement of Comprehensive Revenue and Expense.

The School holds sufficient funds to enable the funds to be used for their intended purpose at any time.

q) Funds held for Capital works

The school directly receives funding from the Ministry of Education for capital works projects that are included in the School five year capital works agreement. These funds are held on behalf and for a specified purpose as such these transactions are not recorded in the Statement of Comprehensive Revenue and Expense.

The School holds sufficient funds to enable the funds to be used for their intended purpose at any time.

r) Shared Funds

Shared Funds are held on behalf of a cluster of participating schools as agreed with the Ministry of Education. In instances where funds are outside of the School's control, these amounts are not recorded in the Statement of Comprehensive Revenue and Expense. In instances where the school is determined to be the principal for providing the service related to the Shared Funds (such as the RTLb programme), all income and expenditure related to the provision of the service is recorded in the Statement of Comprehensive Revenue and Expense. The School holds sufficient funds to enable the funds to be used for their intended purpose.

s) Provision for Cyclical Maintenance

The property from which the School operates is owned by the Crown, and is vested in the Ministry. The Ministry has gazetted a property occupancy document that sets out the Board's property maintenance responsibilities. The Board is responsible for maintaining the land, buildings and other facilities on the School site in a state of good order and repair.

Cyclical maintenance, which involves painting the interior and exterior of the School, makes up the most significant part of the Board's responsibilities outside day-to-day maintenance. The provision is a reasonable estimate, based on the school's best estimate of the cost of painting the school and when the school is required to be painted, based on an assessment of the school's condition.

The schools carries out painting maintenance of the whole school over a 7 to 10 year period, the economic outflow of this is dependent on the plan established by the school to meet this obligation and is detailed in the notes and disclosures of these accounts.

t) Financial Instruments

The School's financial assets comprise cash and cash equivalents, accounts receivable, and investments. All of these financial assets, except for investments that are shares, are initially recognised at fair value and subsequently measured at amortised cost, using the effective interest method.

Investments that are shares are categorised as 'financial assets at fair value through other comprehensive revenue and expense' for accounting purposes in accordance with financial reporting standards. On initial recognition of an equity investment that is not held for trading, the School may irrevocably elect to present subsequent changes in the investment's fair value in other comprehensive revenue and expense. This election has been made for investments that are shares. Subsequent to initial recognition, these assets are measured at fair value. Dividends are recognised as income in surplus or deficit unless the dividend clearly represents a recovery of part of the cost of the investment. Other net gains and losses are recognised in other comprehensive revenue and expense and are never reclassified to surplus or deficit.

The School's financial liabilities comprise accounts payable, borrowings, finance lease liability, and painting contract liability. Financial liabilities are subsequently measured at amortised cost using the effective interest method. Interest expense and any gain or loss on derecognition are recognised in surplus or deficit.

u) Borrowings

Borrowings on normal commercial terms are initially recognised at the amount borrowed plus transaction costs. Interest due on the borrowings is subsequently accrued and added to the borrowings balance. Borrowings are classified as current liabilities unless the school has an unconditional right to defer settlement of the liability for at least 12 months after balance date.

v) Goods and Services Tax (GST)

The financial statements have been prepared on a GST exclusive basis, with the exception of accounts receivable and accounts payable which are stated as GST inclusive.

The net amount of GST paid to, or received from, the IRD, including the GST relating to investing and financing activities, is classified as a net operating cash flow in the statements of cash flows.

Commitments and contingencies are disclosed exclusive of GST.

w) Budget Figures

The budget figures are extracted from the School budget that was approved by the Board.

x) Services received in-kind

From time to time the School receives services in-kind, including the time of volunteers. The School has elected not to recognise services received in kind in the Statement of Comprehensive Revenue and Expense.

2. Government Grants

| | 2022 | 2022 | 2021 |
|---|------------------|----------------|----------------|
| | Actual | Budget | Actual |
| | \$ | (Unaudited) | \$ |
| Government Grants - Ministry of Education | 315,988 | 237,182 | 270,271 |
| Teachers' Salaries Grants | 652,991 | 555,869 | 634,005 |
| Use of Land and Buildings Grants | 108,637 | 107,799 | 83,404 |
| | <u>1,077,616</u> | <u>900,850</u> | <u>987,680</u> |

The school has opted in to the donations scheme for this year. Total amount received was \$20,100.

3. Locally Raised Funds

Local funds raised within the School's community are made up of:

| | 2022 | 2022 | 2021 |
|--|---------------|---------------|---------------|
| | Actual | Budget | Actual |
| | \$ | (Unaudited) | \$ |
| Revenue | | | |
| Donations & Bequests | 17,475 | 18,000 | 24,572 |
| Fees for Extra Curricular Activities | 6,371 | - | 8,022 |
| Trading | 2,928 | 1,100 | 1,603 |
| Fundraising & Community Grants | 5,205 | 15,900 | 16,362 |
| | <u>31,979</u> | <u>35,000</u> | <u>50,559</u> |
| Expenses | | | |
| Extra Curricular Activities Costs | 9,666 | 4,700 | 9,163 |
| Trading | 1,631 | 1,100 | 2,670 |
| Fundraising & Community Grant Costs | 1,523 | - | 7,895 |
| | <u>12,820</u> | <u>5,800</u> | <u>19,728</u> |
| <i>Surplus for the year Locally raised funds</i> | <u>19,159</u> | <u>29,200</u> | <u>30,831</u> |

4. Learning Resources

| | 2022 | 2022 | 2021 |
|------------------------------|----------------|----------------|----------------|
| | Actual | Budget | Actual |
| | \$ | (Unaudited) | \$ |
| Curricular | 45,514 | 56,000 | 26,150 |
| Library Resources | 1,447 | 650 | 524 |
| Employee Benefits - Salaries | 694,212 | 588,869 | 660,955 |
| Staff Development | 2,943 | 5,000 | 2,121 |
| Depreciation | 32,223 | 24,246 | 25,163 |
| | <u>776,339</u> | <u>674,765</u> | <u>714,913</u> |

5. Administration

| | 2022 | 2022 | 2021 |
|--|----------------|----------------|----------------|
| | Actual | Budget | Actual |
| | \$ | (Unaudited) | \$ |
| Audit Fee | 4,432 | 5,100 | 4,303 |
| Board Fees | 1,100 | 3,000 | 1,265 |
| Board Expenses | 1,070 | 3,895 | 1,551 |
| Communication | 1,891 | 2,150 | 2,160 |
| Consumables | 7,049 | 12,300 | 23,921 |
| Other | 6,159 | 8,430 | 5,889 |
| Employee Benefits - Salaries | 69,695 | 59,287 | 57,332 |
| Insurance | 3,180 | 1,500 | 2,707 |
| Service Providers, Contractors and Consultancy | 7,200 | 7,200 | 6,840 |
| | <u>101,776</u> | <u>102,862</u> | <u>105,968</u> |

6. Property

| | 2022 | 2022 | 2021 |
|-------------------------------------|----------------|----------------|----------------|
| | Actual | Budget | Actual |
| | \$ | (Unaudited) | \$ |
| Caretaking and Cleaning Consumables | 3,641 | 4,800 | 3,889 |
| Cyclical Maintenance Provision | 8,793 | 6,670 | 27,668 |
| Grounds | 8,976 | 1,700 | 682 |
| Heat, Light and Water | 4,373 | 5,500 | 3,506 |
| Rates | 205 | 200 | 196 |
| Repairs and Maintenance | 6,927 | 9,400 | 12,416 |
| Use of Land and Buildings | 108,637 | 107,799 | 83,404 |
| Security | 278 | 200 | 175 |
| Consultancy And Contract Services | 16,588 | 16,600 | 16,588 |
| | <u>158,418</u> | <u>152,869</u> | <u>148,524</u> |

The use of land and buildings figure represents 5% of the school's total property value. Property values are established as part of the nation-wide revaluation exercise that is conducted every 30 June for the Ministry of Education's year-end reporting purposes.

7. Cash and Cash Equivalents

| | 2022 | 2022 | 2021 |
|---|----------------|----------------|----------------|
| | Actual | Budget | Actual |
| | \$ | (Unaudited) | \$ |
| Bank Accounts | 585,930 | 367,401 | 379,991 |
| Cash and cash equivalents for Statement of Cash Flows | <u>585,930</u> | <u>367,401</u> | <u>379,991</u> |

The carrying value of short-term deposits with original maturity dates of 90 days or less approximates their fair value.

Of the \$585,930 Cash and Cash Equivalents \$25,905 is held by the School on behalf of the Ministry of Education. These funds have been provided for the Ministry as part of the school's 5 Year Agreement funding for upgrades to the school's buildings. The funds are required to be spent in 2023 on Crown owned school buildings.

8. Accounts Receivable

| | 2022 Actual \$ | 2022 Budget (Unaudited) \$ | 2021 Actual \$ |
|--|----------------------|-------------------------------------|----------------------|
| Receivables | 2,686 | - | 714 |
| Banking Staffing Underuse | 2,481 | 11,984 | 2,625 |
| Interest Receivable | 172 | 348 | 380 |
| Teacher Salaries Grant Receivable | 54,581 | 45,185 | 49,304 |
| | <u>59,920</u> | <u>57,517</u> | <u>53,023</u> |
| Receivables from Exchange Transactions | 2,858 | 348 | 1,094 |
| Receivables from Non-Exchange Transactions | 57,062 | 57,169 | 51,929 |
| | <u>59,920</u> | <u>57,517</u> | <u>53,023</u> |

9. Inventories

| | 2022 Actual \$ | 2022 Budget (Unaudited) \$ | 2021 Actual \$ |
|----------------|----------------------|-------------------------------------|----------------------|
| Uniform / Hats | 1,275 | 763 | 1,095 |
| | <u>1,275</u> | <u>763</u> | <u>1,095</u> |

10. Investments

The School's investment activities are classified as follows:

| | 2022 Actual \$ | 2022 Budget (Unaudited) \$ | 2021 Actual \$ |
|--------------------------|----------------------|-------------------------------------|----------------------|
| Current Asset | | | |
| Short-term Bank Deposits | - | 140,752 | 142,053 |
| Total Investments | <u>-</u> | <u>140,752</u> | <u>142,053</u> |

11. Property, Plant and Equipment

| | Opening Balance (NBV) | Additions | Disposals | Impairment | Depreciation | Total (NBV) |
|--|-----------------------------|---------------|----------------|------------|-----------------|----------------|
| 2022 | \$ | \$ | \$ | \$ | \$ | \$ |
| Building Improvements | 106,314 | 19,247 | - | - | (8,351) | 117,210 |
| Furniture and Equipment | 65,350 | 21,197 | (720) | - | (9,046) | 76,781 |
| Information and Communication Technology | 25,695 | 11,920 | - | - | (10,500) | 27,115 |
| Leased Assets | 4,108 | 12,765 | (8,186) | - | (4,202) | 4,485 |
| Library Resources | 977 | 26 | - | - | (124) | 879 |
| Balance at 31 December 2022 | 202,444 | 65,155 | (8,906) | - | (32,223) | 226,470 |

The net carrying value of equipment held under a finance lease is \$4,485 (2021: \$4,108)

Restrictions

There are no restrictions over the title of the school's property, plant and equipment, nor are any property, plant and equipment pledged as security for liabilities.

| | 2022 | 2022 | 2022 | 2021 | 2021 | 2021 |
|--|----------------------|-----------------------------|-------------------|----------------------|-----------------------------|-------------------|
| | Cost or Valuation | Accumulated Depreciation | Net Book Value | Cost or Valuation | Accumulated Depreciation | Net Book Value |
| | \$ | \$ | \$ | \$ | \$ | \$ |
| Building Improvements | 185,440 | (68,230) | 117,210 | 166,194 | (59,880) | 106,314 |
| Furniture and Equipment | 159,422 | (82,641) | 76,781 | 139,909 | (74,559) | 65,350 |
| Information and Communication Technology | 81,779 | (54,664) | 27,115 | 80,213 | (54,518) | 25,695 |
| Leased Assets | 18,383 | (13,898) | 4,485 | 21,962 | (17,854) | 4,108 |
| Library Resources | 19,044 | (18,165) | 879 | 19,019 | (18,042) | 977 |
| Balance at 31 December | 464,068 | (237,598) | 226,470 | 427,297 | (224,853) | 202,444 |

12. Accounts Payable

| | 2022 | 2022 | 2021 |
|---|---------------|-----------------------|---------------|
| | Actual | Budget (Unaudited) | Actual |
| | \$ | \$ | \$ |
| Creditors | 7,514 | 79,565 | 10,677 |
| Accruals | 2,955 | 3,386 | 2,869 |
| Employee Entitlements - Salaries | 54,581 | 45,185 | 49,304 |
| Employee Entitlements - Leave Accrual | 1,465 | 1,158 | 1,072 |
| | <u>66,515</u> | <u>129,294</u> | <u>63,922</u> |
| Payables for Exchange Transactions | 66,515 | 129,294 | 63,922 |
| Payables for Non-exchange Transactions - Taxes Payable (PAYE and Rates) | - | - | - |
| Payables for Non-exchange Transactions - Other | - | - | - |
| | <u>66,515</u> | <u>129,294</u> | <u>63,922</u> |

The carrying value of payables approximates their fair value.

13. Revenue Received in Advance

| | 2022 | 2022 | 2021 |
|----------------------------|--------------|-----------------------|--------------|
| | Actual | Budget (Unaudited) | Actual |
| | \$ | \$ | \$ |
| Income Received in Advance | 3,175 | 2,846 | 2,970 |
| | <u>3,175</u> | <u>2,846</u> | <u>2,970</u> |

14. Provision for Cyclical Maintenance

| | 2022 | 2022 | 2021 |
|---|---------------|-----------------------|---------------|
| | Actual | Budget (Unaudited) | Actual |
| | \$ | \$ | \$ |
| Provision at the Start of the Year | 21,800 | 28,596 | 24,058 |
| Increase to the Provision During the Year | 6,703 | 6,670 | 6,703 |
| Use of the Provision During the Year | (2,090) | - | (29,926) |
| Other Adjustments | 2,090 | - | 20,965 |
| Provision at the End of the Year | <u>28,503</u> | <u>35,266</u> | <u>21,800</u> |
| Cyclical Maintenance - Current | - | 1,658 | - |
| Cyclical Maintenance - Non current | 28,503 | 33,608 | 21,800 |
| | <u>28,503</u> | <u>35,266</u> | <u>21,800</u> |

Per the cyclical maintenance schedule the school is next expected to undertake painting works during 2025. This plan is based on the schools 10 Year Property plan / painting quotes.

15. Finance Lease Liability

The School has entered into a number of finance lease agreements for computers and other ICT equipment. Minimum lease payments payable:

| | 2022 Actual \$ | 2022 Budget (Unaudited) \$ | 2021 Actual \$ |
|--|----------------------|-------------------------------------|----------------------|
| No Later than One Year | 5,448 | 3,902 | 2,906 |
| Later than One Year and no Later than Five Years | 9,047 | 1,328 | 2,103 |
| Future Finance Charges | (1,793) | - | (396) |
| | <u>12,702</u> | <u>5,230</u> | <u>4,613</u> |
| Represented by | | | |
| Finance lease liability - Current | 4,551 | 3,902 | 2,632 |
| Finance lease liability - Non current | 8,151 | 1,328 | 1,981 |
| | <u>12,702</u> | <u>5,230</u> | <u>4,613</u> |

16. Funds held in Trust

| | 2022 Actual \$ | 2022 Budget (Unaudited) \$ | 2021 Actual \$ |
|--|----------------------|-------------------------------------|----------------------|
| Funds Held in Trust on Behalf of Third Parties - Current | 1,233 | 1,233 | 1,233 |
| Funds Held in Trust on Behalf of Third Parties - Non-current | - | - | - |
| | <u>1,233</u> | <u>1,233</u> | <u>1,233</u> |

These funds relate to arrangements where the school is acting as an agent. These amounts are not revenue or expenditure of the school and therefore are not included in the Statement of Comprehensive Revenue and Expense.

17. Funds Held (Owed) for Capital Works Projects

During the year the School received and applied funding from the Ministry of Education for the following capital works projects. The amount of cash held on behalf of the Ministry for capital works projects is included under cash and cash equivalents in note 7.

| 2022 | Project No. | Opening Balances \$ | Receipts from MoE \$ | Payments \$ | Board Contributions | Closing Balances \$ |
|-------------------------|-------------|---------------------------|----------------------------|-----------------|------------------------|---------------------------|
| AMS/ILE Project Blk 3&5 | completed | - | - | - | - | - |
| Roof Replacement | completed | - | 17,594 | (17,594) | - | - |
| Window Replacement | 237522 | - | 25,905 | - | - | 25,905 |
| Totals | | <u>-</u> | <u>43,499</u> | <u>(17,594)</u> | <u>-</u> | <u>25,905</u> |

Represented by:

| | |
|---|--------|
| Funds Held on Behalf of the Ministry of Education | 25,905 |
| Funds Receivable from the Ministry of Education | - |

| 2021 | Project No. | Opening Balances \$ | Receipts from MoE \$ | Payments \$ | Board Contributions | Closing Balances \$ |
|-------------------------|-------------|---------------------------|----------------------------|-----------------|------------------------|---------------------------|
| AMS/ILE Project Blk 3&5 | completed | 28,414 | 58,472 | (70,166) | (16,720) | - |
| Totals | | <u>28,414</u> | <u>58,472</u> | <u>(70,166)</u> | <u>(16,720)</u> | <u>-</u> |

Represented by:

| | |
|---|--|
| Funds Held on Behalf of the Ministry of Education | |
| Funds Receivable from the Ministry of Education | |



18. Related Party Transactions

The School is a controlled entity of the Crown, and the Crown provides the major source of revenue to the school. The school enters into transactions with other entities also controlled by the Crown, such as government departments, state-owned enterprises and other Crown entities. Transactions with these entities are not disclosed as they occur on terms and conditions no more or less favourable than those that it is reasonable to expect the school would have adopted if dealing with that entity at arm's length.

Related party disclosures have not been made for transactions with related parties that are within a normal supplier or client/recipient relationship on terms and conditions no more or less favourable than those that it is reasonable to expect the school would have adopted in dealing with the party at arm's length in the same circumstances. Further, transactions with other government agencies (for example, Government departments and Crown entities) are not disclosed as related party transactions when they are consistent with the normal operating arrangements between government agencies and undertaken on the normal terms and conditions for such transactions.

19. Remuneration

Key management personnel compensation

Key management personnel of the School include all Board members, Principal, Deputy Principals and Heads of Departments.

| | 2022 Actual \$ | 2021 Actual \$ |
|---|----------------------|----------------------|
| <i>Board Members</i> | | |
| Remuneration | 1,100 | 1,265 |
| <i>Leadership Team</i> | | |
| Remuneration | 314,030 | 306,498 |
| Full-time equivalent members | 3.00 | 3.00 |
| Total key management personnel remuneration | 315,130 | 307,763 |

There are 6 members of the Board excluding the Principal. The Board had held 8 full meetings of the Board in the year. The Board also has Finance (2 members) and Property (2 members) that met 8 and 8 times respectively. As well as these regular meetings, including preparation time, the Presiding Member and other Board members have also been involved in ad hoc meetings to consider student welfare matters including stand downs, suspensions, and other disciplinary matters.

Principal 1

The total value of remuneration paid or payable to the Principal was in the following bands:

| | 2022 Actual \$000 | 2021 Actual \$000 |
|--|-------------------------|-------------------------|
| Salaries and Other Short-term Employee Benefits: | | |
| Salary and Other Payments | 120 - 130 | 120 - 130 |
| Benefits and Other Emoluments | 3 - 4 | 3 - 4 |
| Termination Benefits | - | - |

Other Employees

The number of other employees with remuneration greater than \$100,000 was in the following bands:

| Remuneration \$000 | 2022 FTE Number | 2021 FTE Number |
|-----------------------|--------------------|--------------------|
| 100 - 110 | - | 1.00 |
| | 0.00 | 1.00 |

The disclosure for 'Other Employees' does not include remuneration of the Principal.



20. Compensation and Other Benefits Upon Leaving

The total value of compensation or other benefits paid or payable to persons who ceased to be board members, committee members, or employees during the financial year in relation to that cessation and number of persons to whom all or part of that total was payable was as follows:

| | 2022 Actual | 2021 Actual |
|------------------|----------------|----------------|
| Total | - | - |
| Number of People | - | - |

21. Contingencies

(a) Contingent Assets

In 2022 the Ministry of Education provided additional funding for both the Support Staff in School's Collective Agreement (CA) Settlement and the Teacher Aide Pay Equity Settlement. The school is still yet to receive a final wash up that adjusts the estimated quarterly instalments for the actual teacher aides employed in 2022. The Ministry is in the Process of determining the amount of the final wash up payment for the year ended 31 December 2022. Even though the payment is [confirmed/probable], the amount to be received is not known with a high level of certainty. The school has therefore not recognised the expected receipt (asset) and income in its financial statements. The payment is expected to be received in July 2023.

(b) Contingent Liabilities

There are no contingent liabilities (except as noted below) and no contingent assets as at 31 December 2022 (Contingent liabilities and assets at 31 December 2021: nil).

Holidays Act Compliance – schools payroll

The Ministry of Education performs payroll processing and payments on behalf of boards, through payroll service provider Education Payroll Limited.

The Ministry's review of the schools sector payroll to ensure compliance with the Holidays Act 2003 is ongoing. Final calculations and potential impact on any specific individual will not be known until further detailed analysis and solutions have been completed.

To the extent that any obligation cannot reasonably be quantified at 31 December 2022 a contingent liability for the school may exist.

22. Commitments

(a) Capital Commitments

As at 31 December 2022 the Board has entered into contract agreements for capital works as follows:

\$29,755 contract for the Window Replacement as agent for the Ministry of Education. This project is fully funded by the Ministry and \$25,905 has been received of which \$0 has been spent on the project to balance date. This project has been approved by the Ministry.

(Capital commitments as at 31 December 2021: Nil)

(b) Operating Commitments

There are no operating commitments as at 31 December 2022 (Operating commitments at 31 December 2021: nil).

23. Financial Instruments

The carrying amount of financial assets and liabilities in each of the financial instrument categories are as follows:

Financial assets measured at amortised cost

| | 2022 Actual \$ | 2022 Budget (Unaudited) \$ | 2021 Actual \$ |
|-----------------------------|----------------------|-------------------------------------|----------------------|
| Cash and Cash Equivalents | 585,930 | 367,401 | 379,991 |
| Receivables | 59,920 | 57,517 | 53,023 |
| Investments - Term Deposits | 13,339 | 154,091 | 155,392 |

Total Financial assets measured at amortised cost

| | | |
|---------|---------|---------|
| 659,189 | 579,009 | 588,406 |
|---------|---------|---------|

Financial liabilities measured at amortised cost

| | | | |
|----------------|--------|---------|--------|
| Payables | 66,515 | 129,294 | 63,922 |
| Finance Leases | 12,702 | 5,230 | 4,613 |

Total Financial Liabilities Measured at Amortised Cost

| | | |
|--------|---------|--------|
| 79,217 | 134,524 | 68,535 |
|--------|---------|--------|

24. Events After Balance Date

There were no significant events after the balance date that impact these financial statements.

25. Comparatives

There have been a number of prior period comparatives which have been reclassified to make disclosure consistent with the current year.

INDEPENDENT AUDITOR'S REPORT

TO THE READERS OF FORDELL SCHOOL FINANCIAL STATEMENTS FOR THE YEAR ENDED 31 DECEMBER 2022

The Auditor-General is the auditor of Fordell School (the School). The Auditor-General has appointed me, Mark Fraser using the staff and resources of Silks Audit Chartered Accountants Limited, to carry out the audit of the financial statements of the School on his behalf.

Opinion

We have audited the financial statements of the School on pages 2 to 20, that comprise the statement of financial position as at 31 December 2022, the statement of comprehensive revenue and expense, statement of changes in net assets/equity and statement of cash flows for the year ended on that date, and the notes to the financial statements that include accounting policies and other explanatory information.

In our opinion the financial statements of the School:

- present fairly, in all material respects:
 - its financial position as at 31 December 2022; and
 - its financial performance and cash flows for the year then ended; and
 - comply with generally accepted accounting practice in New Zealand in accordance with with Tier 2 PBE Accounting Standards (PBE IPSAS) Reduced Disclosure Regime

Our audit was completed on 18 May 2023. This is the date at which our opinion is expressed.

The basis for our opinion is explained below. In addition, we outline the responsibilities of the Board and our responsibilities relating to the financial statements, we comment on other information, and we explain our independence.

Basis for our opinion

We carried out our audit in accordance with the Auditor-General's Auditing Standards, which incorporate the Professional and Ethical Standards and the International Standards on Auditing (New Zealand) issued by the New Zealand Auditing and Assurance Standards Board. Our responsibilities under those standards are further described in the Responsibilities of the auditor section of our report.

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We have fulfilled our responsibilities in accordance with the Auditor-General's Auditing Standards.

We believe that the audit evidence we have obtained is sufficient and appropriate to provide a basis for our opinion.

Responsibilities of the Board for the financial statements

The Board is responsible on behalf of the School for preparing financial statements that are fairly presented and that comply with generally accepted accounting practice in New Zealand. The Board of Trustees is responsible for such internal control as it determines is necessary to enable it to prepare financial statements that are free from material misstatement, whether due to fraud or error.

In preparing the financial statements, the Board is responsible on behalf of the School for assessing the School's ability to continue as a going concern. The Board is also responsible for disclosing, as applicable, matters related to going concern and using the going concern basis of accounting, unless there is an intention to close or merge the School, or there is no realistic alternative but to do so.

The Board's responsibilities, in terms of the requirements of the Education and Training Act 2020, arise from section 87 of the Education Act 1989.

Responsibilities of the auditor for the audit of the financial statements

Our objectives are to obtain reasonable assurance about whether the financial statements, as a whole, are free from material misstatement, whether due to fraud or error, and to issue an auditor's report that includes our opinion.

Reasonable assurance is a high level of assurance, but is not a guarantee that an audit carried out in accordance with the Auditor-General's Auditing Standards will always detect a material misstatement when it exists. Misstatements are differences or omissions of amounts or disclosures, and can arise from fraud or error. Misstatements are considered material if, individually or in the aggregate, they could reasonably be expected to influence the decisions of readers taken on the basis of these financial statements.

For the budget information reported in the financial statements, our procedures were limited to checking that the information agreed to the School's approved budget.

We did not evaluate the security and controls over the electronic publication of the financial statements.

As part of an audit in accordance with the Auditor-General's Auditing Standards, we exercise professional judgement and maintain professional scepticism throughout the audit. Also:

- We identify and assess the risks of material misstatement of the financial statements, whether due to fraud or error, design and perform audit procedures responsive to those risks, and obtain audit evidence that is sufficient and appropriate to provide a basis for our opinion. The risk of not detecting a material misstatement resulting from fraud is higher than for one resulting from error, as fraud may involve collusion, forgery, intentional omissions, misrepresentations, or the override of internal control.
- We obtain an understanding of internal control relevant to the audit in order to design audit procedures that are appropriate in the circumstances, but not for the purpose of expressing an opinion on the effectiveness of the School's internal control.
- We evaluate the appropriateness of accounting policies used and the reasonableness of accounting estimates and related disclosures made by the Board.
- We conclude on the appropriateness of the use of the going concern basis of accounting by the Board and, based on the audit evidence obtained, whether a material uncertainty exists related to events or conditions that may cast significant doubt on the School's ability to continue as a going concern. If we conclude that a material uncertainty exists, we are required to draw attention in our auditor's report to the related disclosures in the financial statements or, if such disclosures are inadequate, to modify our opinion. Our conclusions are based on the audit evidence obtained up to the date of our auditor's report. However, future events or conditions may cause the School to cease to continue as a going concern.
- We evaluate the overall presentation, structure and content of the financial statements, including the disclosures, and whether the financial statements represent the underlying transactions and events in a manner that achieves fair presentation.
- We assess the risk of material misstatement arising from the school payroll system, which may still contain errors. As a result, we carried out procedures to minimise the risk of material errors arising from the system that, in our judgement, would likely influence readers' overall understanding of the financial statements.

We communicate with the Board regarding, among other matters, the planned scope and timing of the audit and significant audit findings, including any significant deficiencies in internal control that we identify during our audit.

Our responsibilities arise from the Public Audit Act 2001.

Other information

The Board is responsible for the other information. The other information comprises Statement of Financial Responsibility, Board of Trustees schedule included under the School Directory page and the Analysis of Variance, but does not include the financial statements, Kiwisport statement and Personnel Policy Compliance statement included as appendices, and our auditor's report thereon.

Our opinion on the financial statements does not cover the other information and we do not express any form of audit opinion or assurance conclusion thereon.

In connection with our audit of the financial statements, our responsibility is to read the other information. In doing so, we consider whether the other information is materially inconsistent with the financial statements or our knowledge obtained in the audit, or otherwise appears to be materially misstated. If, based on our work, we conclude that there is a material misstatement of this other information, we are required to report that fact. We have nothing to report in this regard.

Independence

We are independent of the School in accordance with the independence requirements of the Auditor-General's Auditing Standards, which incorporate the independence requirements of Professional and Ethical Standard 1: *International Code of Ethics for Assurance Practitioners* issued by the New Zealand Auditing and Assurance Standards Board.

Other than the audit, we have no relationship with or interests in the School.



Mark Fraser
Silks Audit Chartered Accountants Ltd
On behalf of the Auditor-General
Whanganui, New Zealand

Fordell School

Members of the Board

| Name | Position | How Position Gained | Term Expired/ Expires |
|------------------|-----------------------|------------------------------------|--------------------------------------|
| Linda O'Neill | Presiding Member | Elected | Aug 2022 |
| Yvette Moorhouse | Principal | ex Officio | |
| Darryl Vincent | Parent Representative | Elected | Jun 2025 |
| Nicola Gill | Parent Representative | Elected | Aug 2022 |
| Stacey Houlahan | Parent Representative | Elected | Aug 2022 |
| Kelly Glasgow | Parent Representative | Co-opted | Mar 2024 |
| Amy Ryan | Parent Representative | Co-opted | Dec 2022 |
| Stephanie Laird | Parent Representative | Co-opted | Jun 2025 |
| Matt Johnston | Staff Representative | Elected | Dec 2022 |

Fordell School

Kiwisport

Kiwisport is a Government funding initiative to support students' participation in organised sport. In 2022, the school received total Kiwisport funding of \$2,125 (excluding GST). The funding was spent on sporting endeavours.

Statement of Compliance with Employment Policy

For the year ended 31st December 2022 the Fordell School Board:

- Has developed and implemented personnel policies, within policy and procedural frameworks to ensure the fair and proper treatment of employees in all aspects of their employment
- Has reviewed its compliance against both its personnel policy and procedures and can report that it meets all requirements and identified best practice.
- Is a good employer and complies with the conditions contained in the employment contracts of all staff employed by the Board.
- Ensures all employees and applicants for employment are treated according to their skills, qualifications and abilities, without bias or discrimination.
- Meets all Equal Employment Opportunities requirements.

Compliance with Education and Training Act 2020 requirements to be a good employer for the year ending 31 December 2022

The following questions address key aspects of compliance with a good employer policy:

| Reporting on the principles of being a Good Employer | |
|---|---|
| How have you met your obligations to provide good and safe working conditions? | <i>We have followed our EEO Policy</i> |
| What is in your equal employment opportunities programme? How have you been fulfilling this programme? | <i>We have ensured that all employees and applicants for employment at Fordell School are treated according to their skills, qualifications, abilities and aptitude in fulfilling the requirements of the position, regardless of gender, age, ethnic or cultural backgrounds, nationality, religion, sexual orientation, family responsibilities, disability or illness, whether they work part of full time.</i> <i>As part of our Policy we have an EEO plan.</i> |
| How do you practise impartial selection of suitably qualified persons for appointment? | <i>The Board appoint an employment panel which ensures that bias does not occur.</i> |
| How are you recognising, <ul style="list-style-type: none"> – The aims and aspirations of Maori, – The employment requirements of Maori, and – Greater involvement of Maori in the Education service? | <i>We communicate and consult with our community via a number of different platforms.</i> <i>The Board review data and use this as part of our future planning and goal/target setting.</i> |
| How have you enhanced the abilities of individual employees? | <i>By providing professional development, leadership opportunities and using the Professional Growth Cycle as a tool to support growth.</i> |
| How are you recognising the employment requirements of women? | <i>By ensuring they are supported in their roles and following collective agreements.</i> |
| How are you recognising the employment requirements of persons with disabilities? | <i>By ensuring they are supported in their roles and following collective agreements.</i> |

Good employer policies should include provisions for an Equal Employment Opportunities (EEO) programme/policy . The Ministry of Education monitors these policies:

| Reporting on Equal Employment Opportunities (EEO) Programme/Policy | YES | NO |
|---|------------|-----------|
| | | |

| | | |
|--|-----|--|
| Do you operate an EEO programme/policy? | Yes | |
| Has this policy or programme been made available to staff? | Yes | |
| Does your EEO programme/policy include training to raise awareness of issues which may impact EEO? | Yes | |
| Has your EEO programme/policy appointed someone to coordinate compliance with its requirements? | Yes | |
| Does your EEO programme/policy provide for regular reporting on compliance with the policy and/or achievements under the policy? | Yes | |
| Does your EEO programme/policy set priorities and objectives? | Yes | |

Fordell School Statement of Variance
School: Fordell School **School Number: 2357**
Fordell School LITERACY Annual Target 2022

| | | | |
|---------------------------|---|------------------------|---|
| STRATEGIC GOAL | Rich Curriculum Fordell School will provide rich, child centred learning opportunities through a curriculum founded on empowering students. (Rich literacy and numeracy, integrated learning, sporting and cultural experiences). | CURRICULUM AREA | Literacy/English Reading and Writing |
| ANNUAL GOAL | To accelerate the achievement of learners in Literacy against their expected level. | | |
| ACHIEVEMENT TARGET | Fordell School aims for the highest education standards for all our students and expects students to achieve in all curriculum areas. We will focus on our target groups while maintaining high standards. READING: To accelerate the progress of Māori Boys, Māori Girls and Boys in Reading. <i>With a focus on identified students who have not made enough progress.</i> WRITING: To accelerate the progress of Māori Boys, Māori Girls and Boys in Writing. <i>With a focus on identified students who have not made enough progress/regressed</i> | | |

BASELINE DATA

Analysis of the school-wide 2021 data in December showed that Fordell School students had continued to make progress, however Māori Boys, Māori Girls and Boys is an area that we need to continue to focus on progressing – we are just starting to see the shifts and the decision was made to continue with this focus in order to see more progress in shifts in these identified students.

Fordell School READING data: BASELINE DATA END OF 2021

| 2021 End of Year - READING | | | |
|-----------------------------------|--------------|-----------|--------------|
| | BELOW | AT | ABOVE |
| All Students | 21% | 50% | 29% |
| Maori Students | 27% | 53% | 20% |
| All Boys | 21% | 55% | 24% |
| All Girls | 19% | 45% | 36% |
| Maori Boys | 27% | 53% | 20% |
| Maori Girls | 27% | 53% | 20% |

READING

- 79% of all students achieving AT and ABOVE
- 21% of all students achieving BELOW
- 73% of all Māori achieving AT and ABOVE
- 27% of all Māori achieving BELOW
- 79% of all Boys achieving AT and ABOVE
- 21% of all Boys achieving BELOW
- Year 2, 6, 7, and 8 have the largest numbers in the BELOW expected levels at this point in time, this is an area for us to investigate and monitor in 2022.

In 2022:

- Focus on boys who are not achieving at the same rate as girls.
- Focus on Māori students (boys and girls) who are achieving below that of their peers.
- Focus on students who have not made enough progress (not just a focus on the BELOWS)

FORDELL SCHOOL WRITING data: BASELINE DATA END OF 2021

| 2021 End of Year - WRITING | | | |
|-----------------------------------|--------------|-----------|--------------|
| | BELOW | AT | ABOVE |
| All Students | 27% | 47% | 26% |
| Maori Students | 40% | 50% | 10% |
| All Boys | 32% | 53% | 15% |
| All Girls | 21% | 40% | 39% |
| Maori Boys | 40% | 60% | 0% |
| Maori Girls | 40% | 40% | 20% |

WRITING

- 73% of all students achieving AT and ABOVE
- 27% of all students achieving BELOW
- 60% of all Māori achieving AT and ABOVE
- 40% of all Māori achieving BELOW
- 68% of all Boys achieving AT and ABOVE
- 32% of all Boys achieving BELOW
- 2021 Year 4, 6, and 7 have the largest group with - BELOW students, this is an area to further investigate at the start of 2022 and monitor.

In 2022:

- Focus on accelerating Māori students (boys and girls).
- Focus on accelerating Boys.
- Focus on any other 2021 identified students that have not made enough progress (not just a focus on the BELOWS).

| ACTIONS | EXPECTED OUTCOMES |
|---|---|
| <ul style="list-style-type: none"> Review end of 2021 assessment data and start of 2022 assessment, determining the particular learning needs of target students/cohort. Students flexi grouped according to learning needs/area to focus (not necessary ability). Use knowledge of Māori having success being Māori – look at developing a MASAM Framework (Māori Achieving Success as Māori). Evaluate and revise Fordell School Curriculum Document. To strengthen Whānau partnerships through consultation and sharing information about strategies and plans for raising Māori achievement and success across Fordell School – this is part of our Takatini Goal Whānau Engagement. Build teacher knowledge and pedagogy around what an effective literacy (reading and writing) programmes looks like/includes, especially that of being Rich Curriculum and explicit teaching of targeted learning needs. Build teacher knowledge/pedagogy around ‘best practise’ of teaching literacy – all staff to attend 2022 PD Structured Literacy (we have been accepted into this PD). Attend any other available PD that supports this target, and use new learning to enhance reading teaching and learning. Visit other teachers/schools to observe effective teaching of literacy programmes. Effectively teach students how to use the text to support their responses, locate information. Teach students how to elaborate on their writing ideas, adding more than one idea/information. Use information that is gained through using the Curriculum Progress Framework and tool. Teach students the different structures and purpose for different styles/genres of writing. Teach students to be reflective in their learning – developing metacognition. Provide additional Teacher Aide support hours Online resources, apps, programmes and other resources to support teaching and learning in literacy. Time 1 and Time 2 achievement shared with Board and students, showing shifts/progress. Termly reporting to Board of target students showing progress. Teachers using data ongoing to identify learning needs and progress. Regular Monitoring Meetings as a whole staff – collaboratively planning and designing programmes to meet the needs of learners. Work with parents/whānau around ways to further support learning at home. Apply to RTLB, RTLit, Learning Support as required. Provide a variety of resources to motivate and engage students. Use of WALTs and SC with students so that they know what they are learning and the steps needed, students active in this process and being self-reflective. Class learning plans include target learners, next steps and reflections. Use of FS Learning Muscles 4Rs to promote learning. Reading Together Programme to be offered to families in 2022. Promote sharing of successes – with home and other staff. PACT – using knowledge of the curriculum framework to make evidence based decisions about where a learner is at. | <p>READING</p> <ul style="list-style-type: none"> Identified students will be making accelerated progress towards achieving AT and ABOVE their expected levels as illustrated in the New Zealand Curriculum. Increased in % of AT and ABOVE students. Increase marks in asTTle Reading, STAR, running records, progress shown in PACT. Increase in boys achieving AT and ABOVE expected levels. Increase in Māori students (boys and girls) achieving AT and ABOVE expected levels. Through rich curriculum an increase in the enjoyment and recognising the benefits of being a reader. Whānau/families involved in their children’s learning – what does success look like – part of Graduate Profile. FS Curriculum Document reflects success for Māori Learners. Teachers have knowledge and skills in teaching using the “structured literacy” approach that benefits all students but is essential for struggling and dyslexic learners. <p>WRITING</p> <ul style="list-style-type: none"> Identified students making accelerated progress towards achieving AT and ABOVE their expected levels as illustrated in the New Zealand Curriculum. Increased in % of Māori students (boys and girls) in AT and ABOVE levels for their expectation. Increase in Boys achieving AT and ABOVE expected levels. Increase in all students achieving AT and ABOVE expected levels. Through rich curriculum an increase in the enjoyment and recognising the benefits of being a writer, seeing the links between reading and writing. Students experiencing success in writing across the curriculum. Increase marks in e-asTTle Writing. Progress can be seen in their independent writing/writing books. Spelling knowledge is increased, accurate use of spelling – using knowledge of spelling rules/codes. Whānau/families involved in their children’s learning – what does success look like – part of Graduate Profile. FS Curriculum Document reflects success for Maori Learners. Teachers have knowledge and skills in teaching using the “structured literacy” approach that benefits all students but is essential for struggling and dyslexic learners. |

ACHIEVED OUTCOMES (What did we do? What happened? Why did it happen?)

Fordell School identified a group of students needing further intervention beyond the Tier 1/usual classroom literacy programme. These students have been identified as not working at their current level of expectations, in some cases students are BELOW (1 year), WELL BELOW (more than 2 years) their current level of expectation, or students that are sitting on the cusp of BELOW/AT AT/ABOVE who teachers feel should be achieving at a higher level.

Teachers have interrogated data breaking it down into strengths and areas requiring focus. Alongside this teacher use students' interests, family supports/links, support from peers and colleagues. With all this information teachers have designed and modified programmes to support students in making progress towards achieving at and beyond expected levels.

To be able to better monitor these identified students in 2021 we designed a way to **report on the progress** for identified students under our Fordell School Targets. By using this way of monitoring teachers have made a judgement based on **student progress** using their evidence of the student's learning and robust discussions amongst staff. We can see how the rate of progress is impacting their overall move towards expected levels or even above expected levels. As some of our identified target students are not BELOW but AT and we feel they should be ABOVE expected levels.

The key used to track and monitor progress:

| | |
|-----------------------------|--|
| Some Progress | Some progress Some progress has been made but not at the expected rate of 1 year. The student has made less than one year progress. |
| Expected Progress | Expected progress The student has made 1 year progress. 1 year progress is the expected amount of progress for normal progressing students. |
| Accelerated Progress | Accelerated progress Accelerated progress is when a student's progress is noticeably faster than might otherwise have been expected. The student has made more than a year's progress in a year. This is considered accelerated progress. |

Students are tracked and monitored through their interventions and a judgement has been made on **their progress**; some progress, expected progress, accelerated progress. Our aim is for students to be having accelerated progress, with this type of progress we are then able to close the gap for them to "catch up" and reach their expected level for their age/learning and beyond. If a student is BELOW expected levels this may not happen in a year (dependent on how far below a student is), but with the commitment of staff we can do this over a period of time. Therefore, it is important that at Fordell School we all understand and know all of our learners. Students that are not making enough progress may require outside intervention/support (Tier 3), which is applied for.

TARGET: READING

READING: To accelerate the progress of Māori Boys, Māori Girls, and Boys in Reading.

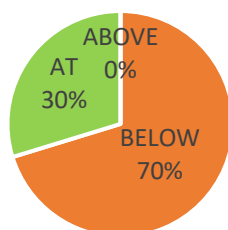
With a focus on identified students who have not made enough progress.

Overall Picture of Identified Target Student's Achievement Against Expected Levels

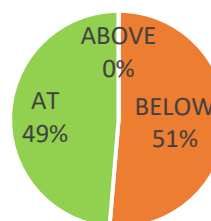
| Time 1 | BELOW | AT | ABOVE |
|--------------|-------|----|-------|
| All Students | 26 | 11 | 0 |

| Time 2 | BELOW | AT | ABOVE |
|--------------|-------|----|-------|
| All Students | 19 | 18 | 0 |

2022 Target Students Achievement -
Reading Time 1



2022 Target Students Achievement -
Reading Time 2



37 students have been identified to target for 2022. 14 Māori, 8 Māori Boys, 6 Māori Girls, and 31 Boys.

At Time 2:

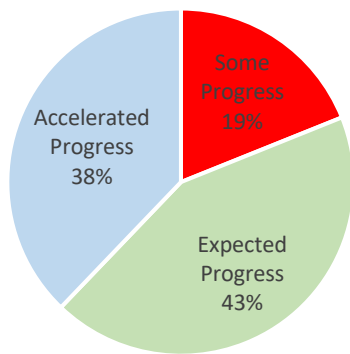
- 51% (19 students) are BELOW. This was 70% (26 students) at Time 1.
- 49% (17 students) are AT. This was 30% (11 Students) at Time 1.
- 7 students have shifted from BELOW into their expected level for AT

Tracking Progress Time 1 to Time 2 - All Identified Students in Reading

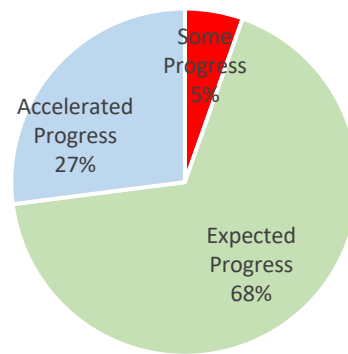
| READING Targets | Some Progress | | Expected Progress | | Accelerated Progress | |
|-----------------|---------------|--------|-------------------|--------|----------------------|--------|
| | Time 1 | Time 2 | Time 1 | Time 2 | Time 1 | Time 2 |
| Numbers | 7 | 2 | 16 | 25 | 14 | 10 |
| Percentage | 19% | 5% | 43% | 68% | 38% | 27% |

| Students Broken into Reading Target Groups - comparing Time 1 to Time 2 | | | | | | |
|---|---------------|--------|-------------------|--------|----------------------|--------|
| | Some Progress | | Expected Progress | | Accelerated Progress | |
| | Time 1 | Time 2 | Time 1 | Time 2 | Time 1 | Time 2 |
| ALL MĀORI | 2 | 1 | 7 | 9 | 5 | 4 |
| MĀORI BOYS | 1 | 0 | 4 | 6 | 3 | 2 |
| MĀORI GIRLS | 1 | 1 | 4 | 3 | 3 | 2 |
| ALL BOYS | 6 | 1 | 13 | 22 | 12 | 8 |

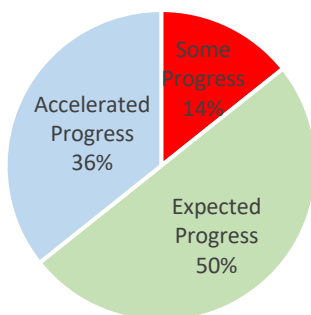
2022 Time 1 Monitoring Reading Target - ALL



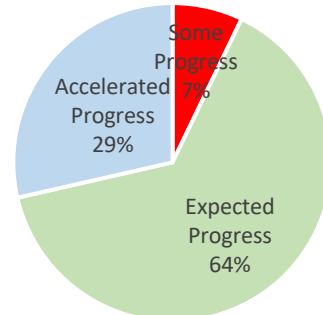
2022 Time 2 Monitoring Reading Target - ALL



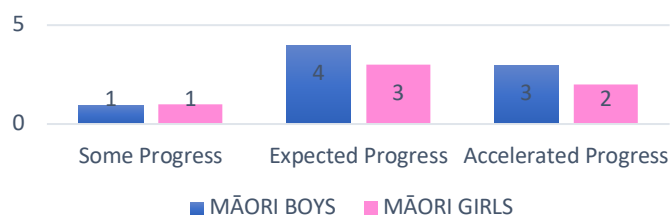
2022 Time 1 Monitoring Reading Target
ALL MĀORI



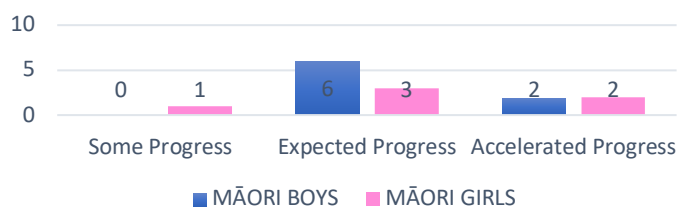
2022 Time 2 Monitoring Reading Target
ALL MĀORI



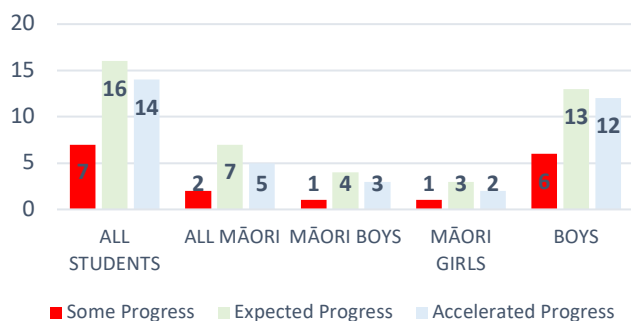
**2022 Time 1 Monitoring Reading Target
Māori Boys and Girls**



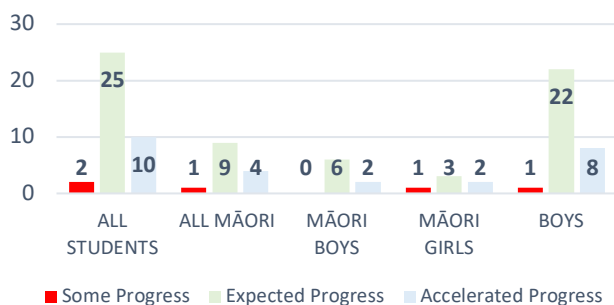
**2022 Time 2 Monitoring Reading Target
Māori Boys and Girls**



**2022 Time 1 Monitoring of Target: READING
All Groups**



**2022 Time 2 Monitoring of Target: READING
All Groups**



We can see at this point in time that the majority of our reading target students are making expected and accelerated progress 95%. When we see the numbers increasing in the *Some Progress* area we investigate further to see what is happening for that student. However, the data here is showing us that we only have 2 students who have stayed in *Some Progress* with 5 students shifting into *Expected Progress*. We know that students will often make spurts of progress – the concern is when they sit in *Some Progress* continuously all year, making the gap to their expected levels even bigger.

The Māori picture is 93% of students making *Expected* and *Accelerated* progress. There has been a decrease in *Some Progress* going from 14% to 7% (1 student shifting). A pleasing thing to note is at Time 2, 5 Boys have shifted from *Some Progress*. Overall, this shows that learning progress is happening for our targeted students towards closing the gap or have closed the gap to meet their expected levels they should be working at.

Attendance - Reading Target Students

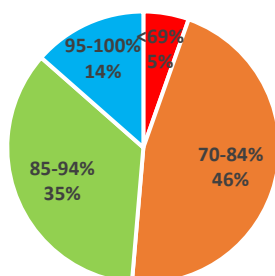
(This is an identified variable that can impact progress)

This is something we started monitoring as part of our targets – to see if this is impacting progress for some students, especially as our Takatini goal is Whānau Engagement. Part of this has been engaging with families/whānau and openly sharing and discussing attendance numbers and pattern throughout the year. This shows attendance in Time 1 was 49% of this cohort attending more than 85% has increased in Time 2 to 60% attending more than 85%.

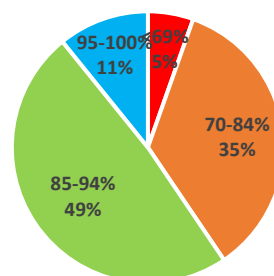
| Time 1 Attendance | <69% | 70-84% | 85-94% | 95-100% |
|--------------------|------|--------|--------|---------|
| Number of Students | 2 | 17 | 13 | 5 |

| Time 2 Attendance | <69% | 70-84% | 85-94% | 95-100% |
|--------------------|------|--------|--------|---------|
| Number of Students | 2 | 13 | 18 | 4 |

2022 Target Students Attendance - READING Time 1



2022 Target Students Attendance - READING Time 2



TARGET: WRITING

WRITING: To accelerate the progress of Māori Boys, Māori Girls and Boys in Writing.

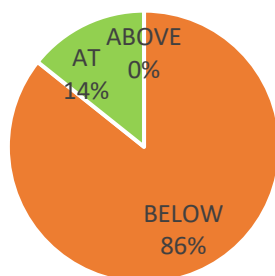
With a focus on identified students who have not made enough progress/regressed

Overall Picture of Identified Target Student's Achievement Against Expected Levels

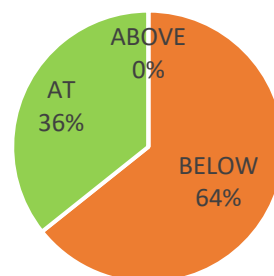
| TIME 1 | BELOW | AT | ABOVE |
|--------------|-------|----|-------|
| ALL STUDENTS | 36 | 6 | 0 |

| TIME 2 | BELOW | AT | ABOVE |
|--------------|-------|----|-------|
| ALL STUDENTS | 27 | 15 | 0 |

2022 Target Students Achievement -
WRITING Time 1



2022 Target Students Achievement -
WRITING Time 2



42 students have been identified for this target for 2022. 12 Māori, 7 Māori Boys, 5 Māori Girls, and 35 Boys. At Time 2:

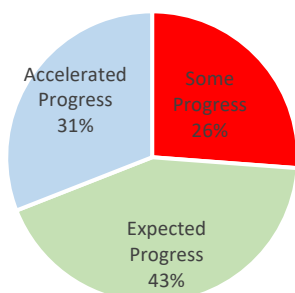
- 64% (27 students) are BELOW. At Time this was 86% (36 students) BELOW.
- 36% (15 students) are AT. At Time 1 this was 14% (6 students) AT.
- 9 students have shifted from BELOW into their expected level for AT.

Tracking Progress Time 1 to Time 2 - All Identified Students in Writing

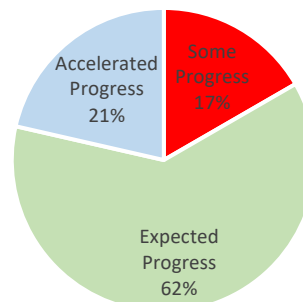
| WRITING Targets | Some Progress | | Expected Progress | | Accelerated Progress | |
|-----------------|---------------|--------|-------------------|--------|----------------------|--------|
| | Time 1 | Time 2 | Time 1 | Time 2 | Time 1 | Time 2 |
| Numbers | 11 | 7 | 18 | 26 | 13 | 9 |
| Percentage | 26% | 17% | 43% | 63% | 31% | 21% |

| Students Broken into Writing Target Groups - comparing Time 1 to Time 2 | | | | | | |
|---|---------------|--------|-------------------|--------|----------------------|--------|
| | Some Progress | | Expected Progress | | Accelerated Progress | |
| | Time 1 | Time 2 | Time 1 | Time 2 | Time 1 | Time 2 |
| ALL MĀORI | 3 | 1 | 5 | 8 | 4 | 3 |
| MĀORI BOYS | 2 | 0 | 3 | 5 | 2 | 2 |
| MĀORI GIRLS | 1 | 1 | 2 | 3 | 2 | 1 |
| ALL BOYS | 9 | 6 | 15 | 21 | 11 | 8 |

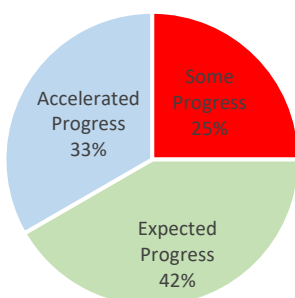
**2022 TIME 1 MONITORING WRITING
TARGET ALL**



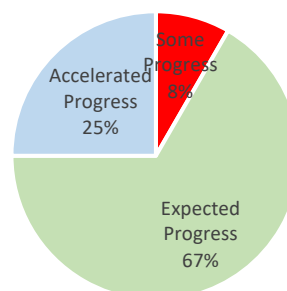
**2022 TIME 2 MONITORING WRITING
TARGET ALL**



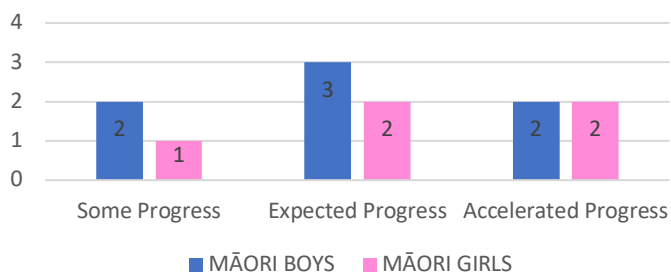
**2022 Time 1 Monitoring Writing Target
Māori**



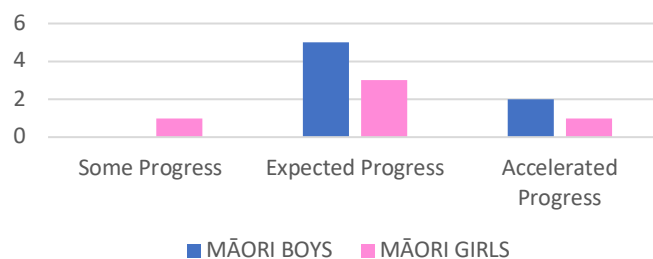
**2022 Time 2 Monitoring Writing Target
Māori**



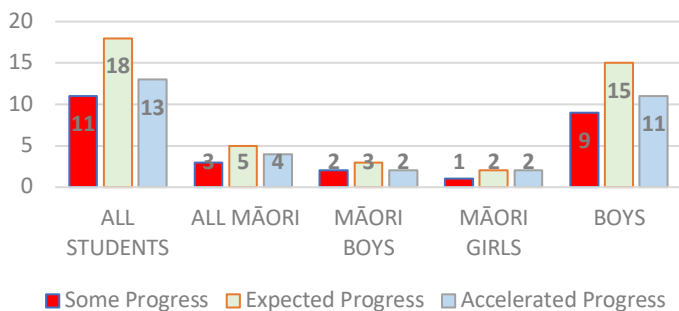
**2022 Time 1 Monitoring Writing Target
Māori Boys and Girls**



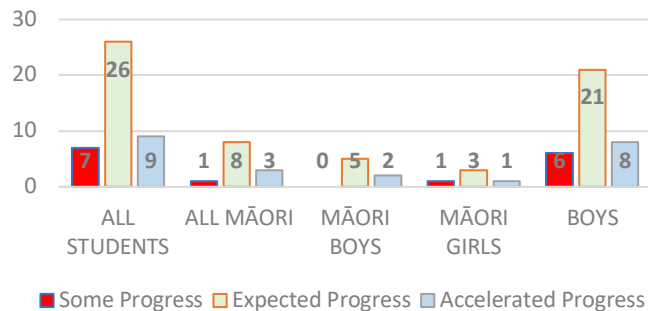
**2022 Time 2 Monitoring Writing Target
Māori Boys and Girls**



**2022 Time 1 Monitoring Writing Target
All Target Groups**



**2022 Time 2 Monitoring Writing Target
All Target Groups**



At this point we can see 83% of our writing target students are making *Expected* and *Accelerated* progress, compared to 74% in Time 1. We can see the numbers in the *Some Progress* has decreased with the *Expected Progress* increasing. The concern is the 7 students who have remained in the *Some Progress*.

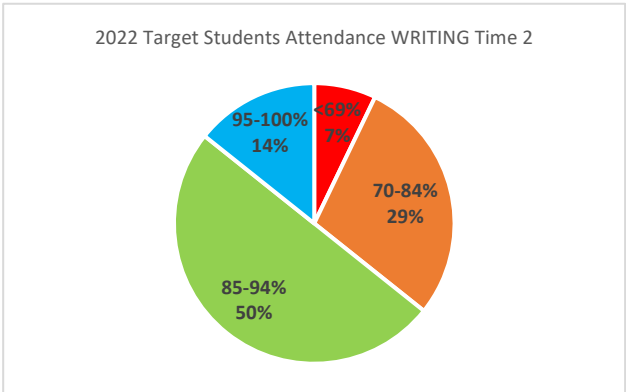
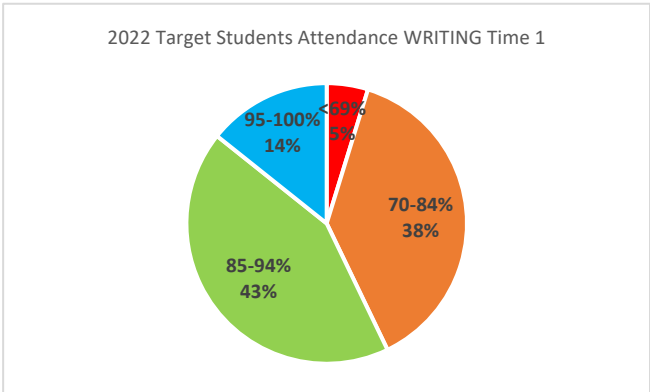
The Māori picture is 92% of students making *Expected* and *Accelerated* Progress. There has been a decrease from 25% to 8% in the *Some Progress*. Overall, this shows that learning progress is happening for targeted students towards closing the gap or have closed the gap to meet their expected levels they should be working at.

Attendance - Writing Target Students

(This is an identified variable that can impact progress. Under Reading this is described))

| Time 1 Attendance | <69% | 70-84% | 85-94% | 95-100% |
|--------------------|------|--------|--------|---------|
| Number of Students | 2 | 16 | 18 | 6 |

| Time 2 Attendance | <69% | 70-84% | 85-94% | 95-100% |
|--------------------|------|--------|--------|---------|
| Number of Students | 3 | 12 | 21 | 6 |



What did we do? What happened? Why did it happen?

- 2022 staff reviewed the end of year 2021 assessment data and the start of 2022 assessment data. This identified learning needs of all students and identified students to target and areas to focus. With a combination of explicit teaching and continuous monitoring of students kept their progress to the forefront – again being a small school we can easily support each other because we know all the students and their learning.
- Teaching staff continued to build their knowledge around the “structured literacy” approach with the support from the Resource Teaching for Literacy (RTLb) Professional Development. These workshops in Structured Literacy have been attended by all staff.
- As our Achievement Goal as part of Takatini we have continued to look at ways we can better engage with our families/whānau. We reviewed how we were engaging with families and further refined these interactions.
- The platform Seesaw has been used throughout the school and the changed format for Mid-Year Student Conferences. Mid-Year Conferences are not only a sharing and celebrating successes but planning together goals for the second half of 2022 and how home and school work together in achieving these.
- With our continued larger roll, it has meant extra staffing numbers, which has enabled teachers to attend Professional Development and visit other schools/colleagues.

Internal Interventions (Tier 2)

Decodable Text and Teaching the Code Spelling

The journey into the use of Structured Literacy through using decodable texts with our 5 year olds started in 2020 with the Fordell School Lead Literacy Teacher inquiring into it and trialling parts. By 2022 all staff have been part of Structured Literacy training through the Professional Development offered by RTLb and also by attending other Structured Literacy Professional Development. This has meant a shift from one approach to teaching literacy to a more focused and structured approach. All junior students are starting with the structured literacy approach and when they get to stage 7 they transition to the reading colour band, this transition happens during year 2. For further up the school the structured literacy approach has been used for identified and targeted students who we can see are missing these foundations.

Explicit Teaching

Staff continue to use their knowledge and skills in planning programmes that are created around students’ learning needs. Teachers then explicitly teach what a student needs to learn/know in order to have success and make progress. Teachers use deliberate acts and knowledge of strategies to meet these needs – often working collaboratively across the school to brainstorm effective ways and approaches for certain students. PaCT Professional Development finished in June, this has been valuable in providing teachers with the

tools to not only have a base to moderate their judgements about whether a student is AT their expected levels but also provides the steps/skills needed – it could be the missing step/skill that is holding a student back.

Whanau Engagement and Empowerment

Staff have an understanding and that an important factor that promotes success and acceleration in our students is whanaui/family engagement and student empowerment. This aligns with our Takatini achievement goal of “Whanau Engagement”. We have reviewed our ways of engaging with our families and working on the mantra of “the power of three – home, school and student”. Due to our efforts with engaging our families and supporting them in supporting their students and using their knowledge of their children we have increased engagement in learning. This is showing through our higher than national levels of school attendance – we are currently sitting around 88% across the school. We have seen increased attendance for our identified target students.

The programme Reading Together was offered to all families again this year. With all staff making contact with families offering this valuable programme of 3 workshops (it is not just a programme for target learners but all learners benefit from their families taking part). Unfortunately out of our 90 families only 1 family took this up.

Teacher Aide Hours

The 2022 budget included hours specifically targeted to meet learning needs of identified students. Due to us taking part in the Professional Development run by RTLb we have been unable to apply for literacy help therefore this has meant less funding to employ teacher aides to support learning programmes. Therefore the Board have funded extra hours. During 2022 we have employed 3 Teacher Aides – therefore reaching more students. Programmes have been targeted at: speech, targeted programmes set up by SENCO and Class teachers to meet identified needs for students.

External Interventions – Tier 3

The SENCO team meets regularly and discusses students that are at risk or a concern. Where needed an application to an outside intervention group is made e.g., Resource Teacher for Literacy (RTLIT) and Resource Teacher for Learning and Behaviours (RTLb), Children, Adolescence Mental Health (CAMHS), Public Health Nurse. The Fordell SENCO team is made up of: Principal, SENCO teacher, RTLb liaison, Learning Support Liaison and anyone else we need to be part of this meeting.

SENCO Register for 2022

As noted above during 2022 we have been unable to refer students for literacy needs to RTLb, therefore there have been no Tier 3 interventions for these students during 2022 – this is a variable that could have further assisted their progress if it had been available.

EVALUATION (Where to next?)

Conclusion and Next Steps for 2023

We have seen a shift in our target areas but still recognise this is an area that continues to need time. Through our progress reporting we can see progress is being made towards these students closing the gap and learning at their expected levels and a shift in those identified as should be achieving above expected levels. Despite the progress some students have made not all identified students shifted enough to get into expected areas or above expected areas.

Identified students will continue to be monitored into 2023, just as some have continued to be for a number of years. We will continue to focus on accelerating all students and looking at ways to adapt and change so that we can maximise learning. Staff will continue to discuss, challenge, visit each other's rooms and other schools; investigating different approaches and practises that are shown to be affective in accelerating students.

Where possible we will continue to apply for outside interventions.

Budget for resources and Teacher Aide hours in the 2023 budget so that we can continue to have targeted programmes for learners.

An idea from staff was that instead of splitting these students into Reading and Writing targets they should be under just Literacy, covering both reading and writing as this is something that has been highlighted from the Professional Development this year – reading and writing go together: Readers are Writers, and Writers are Readers. The next level down would be staff inquiring in which literacy demand is the area to focus.

It has also been observed that building up student's resilience would benefit approaches to learning when it is challenging/new. This will likely form part of the 2023 Fordell School Target.

Fordell School Annual Targets 2022

Fordell School WELLBEING Annual Target 2022

| | | | |
|---------------------------|--|------------------------|-------------------------|
| STRATEGIC GOAL | Wellbeing Fordell School will provide an environment where every learner/akonga feels safe (physically and emotionally), appreciated and included for who they are, including their identity, language and culture, and learning needs. | CURRICULUM AREA | HEALTH/ALL AREAS |
| ANNUAL GOAL | To lift the wellbeing of all students at Fordell School. | | |
| ACHIEVEMENT TARGET | Fordell School provides a physically and emotionally safe environment for all students so that they can experience success in all that they do. To grow the social emotional wellbeing of our students through PB4L, Cultural Responsiveness and Restorative Practise. | | |

| BASELINE DATA | ACTIONS | EXPECTED OUTCOMES |
|--|--|---|
| <ul style="list-style-type: none"> - Surveys and Voice: Results from survey's shows we still have areas to focus and maintain. - Baseline data from PB4L (using PB4L tools). - Due to COVID disruptions we are still embedding Tier 2 interventions, ensuring we have well set up programmes to support Tier 2 students. - Teacher anecdotal notes: Teachers continue to put new strategies and skills into practise. Further practise is required so that these become embedded in our practise. - Data from PB4L showed we are on the right track with: values, being welcoming, have a safe and inclusive environment, we are relational, consistent in dealing with issues and problems, students know their voice is important - Areas for us to embed and grow: <ul style="list-style-type: none"> - Investigate different ways for students to share their view/perspective of situations. Support families further in using strategies at home, use of pro-active programmes and tools like Circle Time, Zones of Regulation, Growth Mindset | <ul style="list-style-type: none"> • Continue to build on home/school relationships - regular contacts made with families (not just the ones we see often at school). • Look at new ways of engaging with whānau/families. • To strengthen Whanau partnerships through consultation and sharing information about strategies and plans for raising Maori achievement and success across Fordell School. • Monitor Cultural Responsiveness knowledge, revisit with all staff our knowledge and understanding. • Set up Tier 2 interventions and programmes learnt through PB4L (Positive Behaviour for Learning). • PB4L / RP team to attend all training workshops. • PB4L / RP team to lead the implementation at Fordell School. • Collect data and use this to inform choices - using Fordell School PB4L site. (ensure all staff are trained in this) • Reinforce expectations for areas around Fordell School using our Values, reward system - evaluate how effective this is. • All staff to be consistent with expectations. • Consistent language is used - Values and Learning Muscles. • Continue with building relationships with our local iwi. • Use the school wide reward system to promote positive choices - in and out of class (values slips and value jar). • Implement strategies that were learnt through Restorative Practise training: e.g., Circle Time, New Comers Club, Social Skills Club, etc • Develop an understanding of Growth Mindset - students understand and value what this is, the importance of believing in yourself. Instead of I can't do this it becomes "I can't do this YET". • Develop and use the programme of Zones of Regulation and Learning Pit/Zone. | <ul style="list-style-type: none"> • Whole school successful in the implementation of PB4L and RP. • Whole school consistent in building student social and emotional capability. • Consistent use of shared language - using the school values as our cornerstones. • Students are confident in their wellbeing/sense of belonging - resilience is grown. • Māori achieving success as Māori. • Māori (boys and girls) achievement is accelerated. • Boys achievement is accelerated. • Increased % of AT and ABOVE expectations. • Relationships - students: peer to peer, student to teacher, and home / school are strengthened. |

ACHIEVED OUTCOMES (What did we do? What happened? Why did it happen?)

Outcomes: We have continued to score well in our outside monitoring of how we are tracking with Positive Behaviour for Learning and how sustainable it is at Fordell School. Because we see Positive Behaviour for Learning and Restorative Practise is just what we do here it continues to be a whole school commitment. With the added value of the Professional Development in Restorative Practise undertaken in 2021 this has further strengthened relationships between students, staff and families/whānau.

What did we do? What happened? Why did it happen?

- 2022 saw staff reviewing all Setting Lesson Plans - this has ensured we are consistent in our approach of teaching and rewarding expected behaviours in different settings (both on school site and off). We value the importance of consistency therefore it was

valuable for all staff being part of the reviewing process, with staff also taking these back to students and gathering their feedback too. As these lesson plans have been updated so has our overall Behaviour/Expectation Matrix.

- We started the year with going over what we had learnt during the 2021 Restorative Practise Professional Development. This enabled and reminded staff the importance of incorporating this into their daily class programmes and routines.
- During 2022 we invested time to setting up robust Tier 2 interventions and a process for selecting students who require more than just the usual classroom programme.
 - Check in Check Out
 - Check and Connect
 - New Comers Club
 - Growing Leaders Club
 - Academic Club (catering for students requiring extra help and also groups who need more challenge – our ABOVE students. We have seen a change in students that have been part of interventions. These changes are noticed through our PB4L Data collection and that of student achievement.
- Fordell School likes to align to the term “ambulance at the top of the cliff”, this means that time is putting into building and strengthening relationships with both students and their families. Celebrations of successes is a large part of what we do at Fordell School. With these strong connections and relationships with our families we can then work together when issues/concerns arise.
- 2022 saw Fordell School shift away from using the usual recognised SWIS programme for tracking behaviour. We had a parent design our own PB4L for Fordell School platform to use. This has been fantastic as it is designed to match our school and our settings. We continue to track data using this information – sharing it twice termly with all staff. By doing this it ensures we are all consistent in what our identified areas to focus on are. This data has also been valuable in supporting any applications to a Tier 3 (outside) intervention like RTLb or Learning Support.
- The SENCO team meets twice termly and discusses students that are at risk or a concern. Where needed an application to an outside intervention group is made e.g., Resource Teacher for Learning and Behaviours (RTLb), Children, Adolescence Mental Health (CAMHS), Public Health Nurse. The Fordell SENCO team is made up of: Principal, SENCO teacher, RTLb liaison, Learning Support Liaison and anyone else we invite to be part of this meeting. SENCO looks at both academic and wellbeing of students.

SENCO Register for 2022 (under Wellbeing)

During 2022 5 applications (under behavioural) to RTLb have been submitted. 2 have been allocated, 2 are on the wait list and 1 is still sitting in the processing. This year it has been longer waits for applications – this has been due to outside factors. The Ministry of Education Learning Support Teacher has been a valuable source of knowledge and help this year, with often attending brainstorming meetings to support teachers with new ideas and approaches.

EVALUATION (Where to next for 2023?)

2022 has seen Fordell School continue to grow the systems and practises they have put in place – always looking at ways to review and make things better. Our ultimate goal is to have students who are matching and exceeding the Fordell School Graduate Profile. All that we do is centred around our Values (School Expectations) and our Learning Muscles (Key Competencies) – as we believe these are the foundation that set students up for learning.

Looking ahead to 2023:

- Investigate and use different ways for students to share their view/perspective of situations. The gathering of “stories” that we were part of in 2021. We did not get to this during 2022 but would like to next year.
- Gather more voice, especially that of our past students and families – learning what we did well in preparing them and what we can do to better prepare our students for their next step into secondary education.
- Continue offering workshops and fun events where we can support families to use school strategies at home.
- Continue evaluating and updating the Graduate Profile.
- We will have new staff and families joining Fordell School in 2023 – they will be part of the New Comers Club.
- Visit other PB4L and RP schools to see how they operate.
- Investigate whether we can get whole school Professional Development in Mana Potential. Two staff have been part of a one day of this and found it invaluable.
- Staff to attend Pause, Breathe, Smile PD in 2023
- As noted Resilience is an area to grow and develop at Fordell School.

2022

Fordell School

Evaluation

of

Strategic Goals

- **Strategic Goal 1: Rich Curriculum**

Fordell School will provide rich, child centered learning opportunities through a curriculum founded on empowering students. (Rich literacy and mathematics, integrated learning, sporting and cultural experiences)

- **Strategic Goal 2: Wellbeing**

Fordell School will provide an environment where every learner/ākonga feels safe (physically and emotionally), appreciated and included for who they are, including identity, language, culture, and learning needs.

- **Strategic Goal 3: Kaitiakitanga**

Fordell School will be effectively and strategically governed and managed in order to grow achievement, wellbeing and environment for the school community.

*This also makes a part of our 2022 Analysis of Variance and our 2022 Annual Report.
Both are submitted to the Ministry of Education*

Strategic Goal 1 -Rich Curriculum

LINKS TO STRATEGIC PLAN AND GOALS

Fordell School will provide rich, child centered learning opportunities through a curriculum founded on empowering students. (Rich literacy and mathematics, integrated learning, sporting and cultural experiences)

| 2022 Actions SG 1: Rich Curriculum | Achieved Outcome - What did we do? - UP TO HERE! | End of Year Evaluation - Where to Next? |
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| Strengthen quality inquiry processes to ensure deep understandings of our learners are developed, barriers and limitations are identified. Collaborative problem-solving sessions occur regularly to provide strategies that support the needs of all our learners. | <p>At the start of the year the tools that are used to collect information and show progressed were reviewed, with changes made to ensure that teachers are getting the right information to support their teaching and learning programmes.</p> <p>Staff have collectively problem solved strategies and implemented programmes that meet a student's needs. By working collectively together it has supported a teacher with different strategies to try when progress is not happening or not happening an expected or accelerated rate. It sits well with our Fordell slogan that these are all our students not just that teachers. We all know all students and are in this together.</p> <p>Close monitoring of students has continued. With staff again monitoring targets each term. The Class Learning and Wellbeing Plan has been updated to match this.</p> <p>Therefore class teaching and learning programmes are maximising all learning opportunities so that students are making progress.</p> <p>With the PD staff have attended it has supported their confidence in using the structured literacy approaches in their classrooms. From the PaCT PD it has strengthened teacher's confidence in making an overall judgement about where a child is sitting in relation to the expected levels for their age. PaCT also has broken down the steps so teachers feel more confident in ensuring their programmes are not leaving gaps in a student's learning.</p> | <p>Data will continue to be used to inform:</p> <ul style="list-style-type: none"> - future planning (school goals and targets). - families/whanau of student progress in all learning areas and their wellbeing. - inform teachers of student learning needs and next steps in their learning. <p>Continue with monitoring targets as this has shown valuable in keeping this at our forefront and informing how a child is progressing.</p> <p>Continue with working collaboratively to ensure that we are doing the best for our students.</p> |
| All staff involved in the Professional Growth Cycle model that is linked to Strategic Goals and targets/priorities. | 2021 was spent around developing a Professional Growth Cycle for teachers. A shared understanding at what this looks like for us at Fordell School was created, as per requirements. 2022 has seen staff involved in the Fordell School Professional Growth Cycle with their goals being kept at the forefront with many opportunities and time put aside for these professional discussions to happen. Staff have kept their own reflections on what is working well and where to next. Before the end of the year each staff member will have a Professional Growth Cycle Annual Summary Report completed. | We will gather feedback from staff about what has worked well and areas that could be further strengthened, esp as this is our first year using this type of appraisal model. |
| Learning programmes show evidence of multi-dimensional approaches to ensure that every learner is engaged in learning programmes, which are specific to their needs. This is evident through academic, social and emotional needs being identified, and catered for in a planned and deliberate way. | Through a variety of PD this year staff have become confident that their teaching and learning programmes are meeting the needs of all learners. Evidence of success has FS- PB4L site. Where progress is not happening or issues are continuing to arise staff have made applications to Tier 3 Professional Interventions (RTLB - learning and behaviour, and Learning Support). Families have been also an important part of supporting students' progress and staff have made every effort to keep families informed and engaged in their child's learning and progress. This year we have looked at different ways to engage with families and not just the formal ways. We have found that often through our informal get togethers barriers can be removed. | Continue with this action for 2022 as it is an important part of ensuring that we are meeting the needs of all students so that they can make progress in all areas of learning - that of both academic and social emotional. |
| Fordell School Graduate Profile is linked to everything. | The Fordell Graduate Profile has been used alongside teachers designing and creating their programmes. Students know about the Learning Muscles and are beginning to make the links between where they see themselves as learners - in all areas not just the academic, recognising they may be stronger in one area and then another in different curriculum areas. Discussions between teacher and student have then looked at how they might transfer this strength to other areas and what support they need in order to do this. All Fordell students assessed themselves alongside the Graduate Profile and used this as a base for the mid year conferencing. This was shared and in many of the conferences constructed together with parents, student and teacher. | <p>Continue to keep it at the forefront for both teaching and for students to monitor how they are progressing.</p> <p>Gather feedback from community about the skill sets under each muscle and the add on for each year band.</p> |
| Review Fordell School Curriculum Documents to design a responsive | The FS Curriculum document was used to guide and support planning of teaching and learning programmes. It has been designed to create opportunities for rich curriculum learning. | Staff are still keen to attend the Whanganui Place Based Hikoi to build our knowledge around Whanganui history. |

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| curriculum that reflects our local area history and knowledge. | <p>2 staff members attended the NZ Histories Curriculum workshop led by MOE. Staff found this invaluable and shared this learning back with all staff. Staff can see the links and have already started planning ways of incorporating this into their teaching programmes.</p> <p>We have had a parent who has shared the contact person information with us for our local iwi. They are looking forward to supporting us.</p> <p>We were wanting to make changes to this document so that it has a "place based" approach - however due to the rocky start of 2022 (Covid again!) we have not got to a place of where we are happy with this.</p> | <p>This information will then be threaded into our Fordell Curriculum document.</p> <p>Contact with our local iwi/community to further build our knowledge of our local Fordell and surrounding areas.</p> |
| Camp, day trips, community facilities and EOTC experiences, creating a rich platform for student learning. | <p>Senior classes (Year 5-8) attended camps in 2022. Year 5 & 6 went to Makahika Camp (Term 4) and Year 7 & 8 went to Vertical Horizons. The Junior Hub have run "Junior Camp Days".</p> <p>Rich EOTC experiences and activities were undertaken by all students at Fordell School. Students engaged in hands-on real-world experiences and learning. Learning is not always confined to the classroom. A barrier for rural schools is the cost of transport. Over the past year we have seen an increase in bus hireage and the hiring of minivans - especially now that we have only one place to use.</p> | <p>2023 Camp dates and venues to be confirmed.</p> <p>2023 Tuia Challenge activities have been reviewed and dates set.</p> <p>All staff continue to review their teaching programmes to ensure it is creating a rich platform for student learning.</p> <p>2023 Budget to include EOTC experiences for all students.</p> |
| Hands on / Student Led Curriculum is developed - this may include play based learning, project based learning, inquiry learning, and is shared through an exhibition of the learning approach. | <p>Teachers have an effective Inquiry Learning Model. Looking at student agency - students deciding on their direction... Collaborate to support exciting, challenging and meaningful Inquiry programmes. Teachers sharing ideas, resources, successes and challenges.</p> <p>Learners have been engaged in rich motivating and engaging inquiry opportunities whereby they have also been developing their Learning Muscles.</p> <p>This year we also signed up for "House of Science" - which is where we are sent out a science kit with everything in it to run amazing rich motivating and engaging lessons. This has been a huge success and excitement for both staff and students. As these kits have equipment that schools just can't afford to purchase.</p> <p>Junior Hub have continued to have Discovery Time which is where activities are based around the learning muscles and interests of students.</p> <p>One room is trialling 'Chill Time' to start the day - this is showing effectiveness at supporting many students with the start of the day from settling in to getting them ready for learning.</p> <p>Senior Hub have run many integrated programmes where they have crossed over between each other and utilised the strengths of each teacher. One to mention is their Te o Māori programme that have run - with students learning about weaving (not just the doing but the story and beliefs), Ki o rahi - traditional Māori game, Ti raku - stick games.</p> <p>Senior Hub have also continued with their Critical Thinking/Projects time which creates opportunities for students to work together to solve problems and challenges.</p> | <p>Continue with using our integrated Inquiry Learning approach - using as much student interest and culture as we can.</p> <p>Learning muscles language continue to be part of our everyday language.</p> <p>Continue being reflective and looking at ways we can be BTB - Better Than Before. We want the best for our students - so that they are motivated and engaged whilst they are learning.</p> |
| Continue fostering our growing relationships with Cluster Schools - providing opportunities for teachers to collaborate with other schools and teachers. | <p>This year it hasn't been as active between our cluster schools as previous years - this is due to ongoing issues with the pandemic and illness. Whilst we have had teachers from other schools visit us and we have visited some schools it hasn't been as often as we would have liked.</p> <p>Collaboration has happened between our rural schools so that our Tuia Challenge has gone ahead and again been a great programme for our Year 7&8s students to be part of. Cluster events such as Cross Country, Athletics and Speeches have been well attended - with Fordell School performing well in all events.</p> <p>A success has been the continuation of our Town Cluster Admin Group that was set up. The office administrators have been meeting once a term - this has been valuable for having our office admin to have others to connect with.</p> <p>This year The Town Cluster Caretakers group was set up with all our Caretakers getting together once a term. This is in early stages but so far both meetings have been valuable for our caretaker in building relationships with others in the same position at other schools so that ideas and solutions to problems can be shared/solved.</p> | <p>We would like to see the visiting of other schools, admin, and caretaker groups to continue. As mentioned last year it is too easy to become entrenched in our world and it is important to visit other places to see what others are doing. With other schools visiting us it creates an opportunity for all staff to be a leader and share their learning and success.</p> |
| Self-review and active reflections is a cornerstone of our school - reviewing of all documents, procedures, teaching/learning programmes; including that of The Digital Curriculum being embedded | <p>We have continued with a consistent review process. When reviewing documentation and programmes we are looking at tweaks, changes or stop doing things that can be made so that we continue to be BTB - Better Than Before.</p> <p>The Digital Curriculum is part of all that we do not a standalone. Staff often share new ideas and ways of ensuring this threaded into learning programmes.</p> <p>Recognising that this does not mean only the use of devices.</p> | <p>Continue to review and be reflective in all that we do. Using the feedback to do things better.</p> |

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| throughout all learning programmes. | | |
| Professional Learning in Structured Literacy for all staff is undertaken 2022. Ensure every learner gains sound foundation skills. | All staff have attended the Structured Literacy Training run by RTLB - this has been a series of 9 workshops and some in person coaching for our Lead Teachers, who has then feedback to staff. Whilst this has been good for all staff to attend together which ensures consistency throughout our school, it was felt that we may have been a lot further along and a lot of this was revisiting things we were already doing and doing well. We did learn about other resources and online sites that can be used to support this programme. All staff have structured literacy running in their literacy programmes. The amount of it tends to depend on needs of students - whole class in Juniors and more targeted towards certain students in the Seniors for reading and writing however all involved in spelling. We sent one staff member to a Structured Literacy Workshop focusing on Senior School. This gave good support to our senior team and how to approach some areas. | Continue with Structured Literacy at Fordell School. Keeping ourselves up to date with any new resources and methods that continue to come out with this approach to literacy. |
| Consolidate and review teacher practice in literacy and mathematics. Students are writing across the curriculum and have authentic learning context for literacy and mathematics. | With attending Structured Literacy and Just in Time Maths this has created a good platform for us to review our teaching practise in literacy and numeracy. This year has been a knowledge building year and dabbling in new initiatives especially in mathematics. Teachers are ensuring that learning is happening across the curriculum and not just confined to reading, writing and mathematics times. We can see the success of this through the progress students have been making, especially identified target students. | Teachers to continue reflecting on their teaching approaches/practises and programmes to ensure they are creating rich platforms for authentic learning. |
| Grow staff knowledge and confidence in the use of Te Reo and tikanga Māori into everyday life. | Staff have collectively been working through Māori Te Reo workbooks and sharing this learning back with their class. Often with students and teachers learning together - tackling the lessons together. Teachers are showing more confidence in the use of Te Reo in their classrooms - threading it throughout the day and not just a one off lesson. | Teachers to meaningfully incorporate Te Reo and tikanga Māori into everyday life. Create more opportunities to normalise tikanga - it is seen as this is how we do things here. |
| Collaborate with industries and employers to ensure learners have the skills, knowledge and pathways to succeed in work. (esp for Y7&8 career pathways) | Within teaching programmes teachers have made learners aware of possibilities for them in their future. The use of the internet has supported further curiosity. | This is an area that we could further focus on for 2023 - especially the bringing of outside people into school. |

Strategic Goal 3 - Wellbeing

LINKS TO STRATEGIC PLAN AND GOALS

Fordell School will provide an environment where every learner/ākonga feels safe (physically and emotionally), appreciated and included for who they are, including identity, language, culture, and learning needs.

| 2022 Actions SG 2: Wellbeing | Achieved Outcome - What did we do? | End of Year Evaluation - Where to Next? |
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| Teachers will have high aspirations and expectations for all learners, and support these by partnering with their whānau and communities to design and deliver education that responds to their needs and sustains their identities, language and cultures. We are inclusive. | With the knowledge gained through PaCT all staff have a consistent understanding of what the base expectation for each year level is. Staff then have high expectations for all students to have success and support students with the steps towards this. Fordell School has continued to build partnerships with families and whānau to build steps towards realising their aspirations for their children. This has been done through phone calls, in person conversations, conferences, emails and small workshops. Numbers to learning workshops offered have been disappointingly low, so the staff have thought of different ways to engage our families. An excellent example of this was the Fordell School Family Fun Mathex Evening - where families put in Mathex teams to compete but we also used this opportunity to discuss with families about how maths is done at Fordell School and offered helpful hints of what they can do at home. The Mathex questions also required them to provide the school with some feedback. Through engaging with our families in this unique way we gather a different voice than through the traditional survey method. | This is an area to continue with in 2023 as we have seen the benefits of engaging with our families in a different way. Engaging with our local iwi is an area to continue working towards. |
| Review, evaluate and update the Fordell School PB4L statement, Behaviour Matrix and all lesson plans. This forms that FS is a safe place | 2022 has seen staff review all PB4L Lesson Plans for each setting. This then led into updating our Behaviour/Expectation Matrix. The PB4L statement was reviewed and felt that it still represented what we believe here at Fordell School. | 2023 will see two new staff members joining the Fordell Team. They will form part of the "New Comers Club" - they will be supported through understanding our journey and |

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| for learning; free from racism, discrimination and bullying. | | beliefs with PB4L and RP. We will continue to ensure we have the right systems and strategies set up at FS so that are a school free from racism, discrimination and bullying. However, if this arises we have processes in place. |
| Fordell School Values and Learning Muscles are part of teaching and learning programmes – this is reflected in planning and evaluations. | The 4 Values and language is displayed around the school, included in our planning, it is part of our everyday language. Fordell School Values are portable for all students, students are able to name and explain the values and how they look in different areas/environments and learning. This learning makes up part of our reporting to parents/families. | This will continue to be part of what we do here at FS – language is the carrier of our culture. |
| Professional learning in the area of Wellbeing is valued and resourced as necessary so that we can trial programmes on Growth Mindset, Learning Pit, Zones of regulation, resilience focused programmes in all classes. | Staff have continued to attend professional learning that has been available under wellbeing. This has been through PB4L and Restorative Practices. Classes have put in place growth mindset and learning pit/mountains of learning in to classes. We have yet to secure further Professional Learning around Zones of Regulation as it has not been available. We feel that Mana Potential might be more beneficial. | Put in an application for professional development in Mana Potential. |
| Use distributive leadership model to provide leadership opportunities for all staff. | Staff are encouraged to lead areas within the school, and are supported when they do. Action plans at the start of the year were established to provide clear actions as part of their leadership area, reflecting as the year has progressed. Staff will feel empowered to effectively lead an area of the school, developing and refining their leadership capabilities and skills. 2022 has seen our Within School Lead Teacher lead our “Whānau Engagement” goal by looking at unique and different ways to engage with our community. | Revisit our leadership areas – what areas are our focus for 2023? Revisit and reflect on action plans for 2023 – what is it we are wanting to achieve? |
| Review/evaluate our Cultural Responsiveness at Fordell School. How effective are we? Is it evident in our documentation? | Cultural Responsiveness has been threaded through our day/programmes – it is not a ‘stand alone’ area. Teachers are using their skills to ‘normalise’ our culture. When needed staff have used outside facilitators to enhance programmes. Fordell School recognises that it is a school in Aotearoa NZ, all students feel pride of who they are and where they come from, especially that of our Maori students. Maori have success being Maori. We are looking at documents with the Te tiriti o Waitangi lense. | This is an area that we continue to grow in. Staff would like to attend a local area hiko to grow our knowledge of our area. We will be able to tie “place based learning” into our Fordell curriculum – this was unable to happen again for 2022. |
| Restorative Practice: Revisit skills and programmes on building and enhancing relationships, repairing relationships when the need arises eg., circle time, empowered students, WARM chats, relationship building etc. | RP Leaders attended all workshops and cluster meetings/professional development. This learning was brought back to school and shared – ensuring that this kept at the forefront of what we do. We have revisited what we learnt in 2021 and ensured it is part of our programmes e.g., circle time, restorative circles, friendships. | Continue attending workshops that are offered and sharing this back with staff. As mentioned above we will have two new staff joining the team in 2022 – ensure they understand what this is and how it looks in their programmes. Continue to purchase resources to support these programmes in our school. |
| Takatini Goal: Whānau Ora – engagement. To create a powerful connection and relationship between students, parents/whānau and teachers/school. | Fordell School pride themselves on building clear relationships with our families and community. Through this goal we have used opportunities to empower our families are supporting their children's learning and wellbeing. E.g., school events – formal and informal. Communication is an area of strength. The school Facebook page has been a big success for sharing learning, experiences and key messages. | Looking ahead to 2023 – engaging with our local iwi is a goal/direction for us to focus on. |
| Social and emotional development needs of learners are recorded (FS PB4L programme) and programmes are in place for students that need support. Behaviour modification plans are in place for students as required. Learning programmes are responsive to these needs (Tier 2 PB4L). Data is used to make informed decisions. | 2022 has seen Fordell School move from using the SWIS platform for monitoring our behaviour referrals to our own FS-PB4L platform designed by parent. This platform provides us with valuable information about our values, students, areas of the school that may need refocusing on, the functions of behaviour. From this information programmes and next steps are put in place to support students or groups of students to modify their behaviour/social and emotional. Usually once this is in place we see an increase in student focus and learning achievement. | Continue using this platform to monitor our expectations at FS. With new staff coming in 2023 this will be part of the “New Comers Club”. |
| Upskill new students and families so they have a thorough understanding of Fordell School Expectations (using the Behaviour Matrix, | New students and families to Fordell School have an induction meeting where the expectations are explained, that we are a PB4L school (that we put time into teaching, praising and rewarding the behaviour we expect) and use Restorative Practises – relationships are key to us here. | Review how effective our induction meetings with new families and students has been. What can we do better? |

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| lesson plans, Graduate Profile) – newcomers club. | | |
| Student Leadership is developed at all levels, but particularly for our senior students – Tuia Challenge reviewed and changes made. | Student Leadership has continued to be a focus for all students but in particular our Year 7&8 students. We have House Leaders and Deputy House Leaders. Opportunities are provided for these students to grow and refine their skills in the ways of running events. Through the Tuia Challenge this provides opportunities for them to be a leader in some of the challenges. | Continue to develop the leadership skills of our students, looking for new ways to provide opportunities for this to happen. Gather student voice on how effective we have been at this. |
| All hazards (physical and emotional) are identified and recorded in the Hazards Book or Communication Minutes. Hazards will be identified and eliminated around the school. | A Hazards Book is situated in the office, staff record all hazards. Communication Meetings are once a week where we record additional Hazards (physical and emotional) and then how these will be eliminated. Fordell School is a physical and socially safe place for all students, families, staff and visitors. | Continue this practise in 2023. Ensure new staff know about the Hazard Book and the importance of identifying any hazards so these can be eliminated. |

Strategic Goal 3 - Kaitiakitanga

LINKS TO STRATEGIC PLAN AND GOALS

Fordell School will be effectively and strategically governed and managed in order to grow achievement, wellbeing and environment for the school community.

Actions from 2021 Annual Plan

| 2022 Actions SG 3: Kaitiakitanga | Implementation | Expected Outcome | End of Year Evaluation |
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| Continue to review policies and procedures to ensure that they meet legislative requirements and meet the needs of staff and students. | 2022 Fordell Policy Schedule will be followed. Annual Plans and Annual Reports submitted by due dates. Changes are made as new legislative requirements come up. | All Fordell School Policies and Procedures are reviewed on a planned cycle or if the need arises to review earlier than scheduled. All staff and community have clear guidelines on how Fordell School operates. | Policies have been reviewed as per the policy schedule. Some policies the Board have felt could be shifted into a three yearly cycle for review. There has been some new policies added during 2022 to match change in requirements or legalisation. |
| Board of Trustees to engage in vigorous internal evaluation. | Using the ERO documents internally evaluate how we are doing things, looking at ways we can be BTB (Better than Before). Using the Board question cards at meetings to further develop and grow the understanding of roles and scenarios. Board attending PD to continue to develop our knowledge around what is required. This PD also builds relationships with Boards from other local schools. | Fordell School Board are ensuring Fordell School has high quality education and learning that focuses on learning outcomes, student engagement and participation, family and community engagement, and resourcing. The Board are confident in their role as governing Fordell School. Connections/relationships are formed with Boards from other local schools. | The Board continues to review and evaluate how things are tracking and ways to continue to further improve. |
| Data is used to inform future planning and reporting to all stake holders. | Assessment schedule and reporting is reviewed at the start of each year. Data is fully analysed identifying student learning and wellbeing, next steps and then used to plan future teaching and learning programmes. Student progress and achievement, and wellbeing is reported to the Board, students, families/community and MOE as required. | Teachers have a clear understanding of all student learning from using the right tools to gather information. Rich curriculum and targeted programmes are designed and created around using identified needs/next steps. Board and community have knowledge of our school wide student progress and achievement and targets. | Student achievement in reading writing and maths reported to BoT at the end of Term 1 and Term 4 (this meeting). Termly reports on progress around our target students. This kept these students at the forefront and we were able to identify what was working and where we needed further investigation or help to support these learners. Rich curriculum programmes were designed around identified student learning and next steps. Reporting to our community occurred each term with two interviews and two written reports. The written report format continues to be reviewed and revised to match our current environment. The Mid-Year Conferencing includes home and school working together to support a student in achieving their goals. |

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| Continue to provide funding for staff and resource the school appropriately – 2022 budget. | Planned budgeted expenditure for teachers to ensure they can provide Rich Curriculum learning and Wellbeing for Fordell Students. Budget is aligned to Fordell Schools Strategic Goals and annual plan. | Teachers have the required resourcing to enable them to engage students in a rich curriculum and wellbeing – student achievement will be lifted, student and staff wellbeing is paramount. Fordell School is able to achieve its targets and Strategic Goals. | The needs of students and the school are taken into account when the 2022 budget was set. This was reviewed mid-year with adjustments made where needed. During 2022 we increased the Teacher Aide budget to support the increase of 5 year olds we had this year. This has greatly supported their start at school. |
| Set and plan targets for the success of all Fordell School students. Termly monitoring of these targets is in place. | Board, Principal and staff look at school-wide data to investigate patterns and trends, highlighting progress and areas to focus/target so that all learners make progress. Reporting on these targets happens throughout the year. | Fordell School sets explicit and appropriate targets that promote student wellbeing and achievement. | Monitoring of our targets has continued throughout 2022. Targets for 2023 are to still be set. Looking at our current data we may consider continuing with the same targets but setting a more definite amount/percentage to progress – therefore we can measure against this progress. |
| Ensure that student achievement and wellbeing through effective governance is the major focus of the Board. | Ensure student achievement data and progress against targets and goals is monitored through Principal Report and review process. Board are committed to attending professional development workshops and webinars. | Fordell School Board is making informed decisions from data and knowledge gained from PD to govern Fordell School. | This data has supported the Board and staff in making informed decisions regarding PD. |
| Grow leadership legacy of key personnel, including staff, Board, students and committees. | Board, staff and the Fundraising committee (where appropriate) members attend/participate in Professional Development that supports them being effective leaders that govern, manage and support Fordell School in their roles. | Fordell School is growing it's people to be the best they can be which then supports the growth of our school and students. | Staff are supported to grow and develop their leadership skills. One staff member has been part of Takatini and the professional development in leadership that comes with this. One staff member has attended Middle Management Workshops growing and developing their leadership skills in guiding and growing others. Board member PD is shared with board. 2022 saw opportunities to do this PD online which seemed to fit in better with members. We will continue to share and support Board members in attending and sharing back all learning that is offered. Continue with this in 2023 – looking for further opportunities to grow the Fordell Team – staff, students, board and committees. |
| Office Admin, Groundsman and Teacher Aide roles and hours to be reviewed and budgeted for accordingly. | Principal to plan and present staffing to Board, this planning is aligned with Fordell School targets and goals for 2022. | Quality staff are retained and the hours of work support Fordell School programmes and environment. | This was reviewed mid year. Extra hours are used when they are needed. Our support staff are a great asset to Fordell School and their hours make a difference to student learning and wellbeing, and the upkeep of our school environment ensuring it is safe and welcoming to everyone. |
| Evaluate and review the Fordell School Vision. | Begin surveying our community about what they aspire for their students, what is the Fordell flavour? Using this information formulate vision statements that can be 'tasted'. | Fordell School has a vision that clearly leads and tells what we aspire for all our students. This is then reflected through all our supporting documentation. | The Board and staff have been part of the Fordell vision review. This is still ongoing, with a final new vision to be formed. We have an idea of what we are wanting to capture but are still looking for the right wording. |
| Activate the succession plan for new trustees with this being a Board Election year. | Induction pack for new trustees in promotion of the role of a trustee through personal voice of current elected trustees. Investigate and encourage the community to join the Board, inviting some to sit in on meetings. An election officer to be appointed. Election time line: Election process starts: Tuesday 14 June, Election take place: 5-23 September. | All candidates and board members have clear guidelines around their role and what it includes. The school community is well informed about the role of a board member. We have people putting themselves forward as candidates. | The outgoing board were fundamental in sharing and inviting new people to be part of the Fordell Board. Inductions have taken place for new board members and an introduction to what their role is on the board – governing Fordell School. |

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| Investigate and create a 5 Year Property Plan as we are heading into our 2 nd 5 years of our 10 Year Property Plan | The Board and Principal will work with the Property MOE Advisor to plan what needs attending to and what we can further update/improve within our given budget. This will be supported by Education Services Property. | Fordell School has a plan for the 2 nd Year Property Plan that matches the needs of the school, students and staff. | We have just started our 10 Year Property Plan review and update. We are awaiting outcomes of our property checks to see if there any areas that need urgent attention before we put forward ideas that we have. This will continue into 2023. |
| Review Cyclical Maintenance Plan for Fordell School, and implement any projects that are due to be updated/replaced/repared. | BoT and Principal will review the Cyclical Maintenance Plan for Fordell School and implement projects that are due e.g., painting and flooring. Update our Cyclical Maintenance plan through Ed Services. | Fordell School is an attractive and well maintained, safe environment. | This is ongoing. Throughout 2022 we have updated areas and maintained things as planned or needed. We have reroofed Room 4, removed unsafe areas |

Other Actions that fall under this Strategic Goal:

- Fordell School Charter reviewed and implemented under the 2023-2025.
- Targets set and evaluated throughout the year – looking at combining reading and writing to being under a “literacy” target.
- Fordell School Budget set for 2023, reviewed mid-year with adjustments made.
- Student achievement has been shared with the Board of Trustees and other stake holders in reading, writing and maths.
- Targets reported to the Board with particular attention towards progress.
- Policies and procedures have been reviewed and evaluated this year as part of the schedule.
- Operational and Procedures Handbook updated at the start of the year and updates made as needed.
- Emergency Management Plans and Procedures updated at the start of the year and as needed throughout the year.
- Fordell School’s Crisis and Traumatic Incident Procedures
- Fordell School’s Assessment Schedule
- Fordell School information sent out to new families
- Reporting formats evaluated and updated using feedback from parents/families
- 10Year Property Plan started

Next Steps/Actions for 2023

- Fordell School Board of Trustees to continue attending professional development to grow themselves as efficient and effective school trustees.
- Continue evaluating and reviewing policies and procedures as per Board Plan, as we review looking at these through the lens of Te Tiriti o Waitangi.
- Continue resourcing Fordell School to maintain the quality education and expectations that fall under our *Rich Curriculum*.
- Continue growing and planning for our engagement with local whanau and iwi.
- 10 Year Property Plan to be completed.
- Continue to ensure all stake holders are informed and up to date with progress on our goals and targets.
- 2023 targets to be set/confirmed.
- 2023 Fordell School Budget
- 2023 Fordell School Staffing
- 2023-2025 Fordell School Charter
- 2022 Statement of Variance Reporting
- 2022 KiwiSport Self Review
- 2022 Annual Report

STATEMENT OF VARIANCE AND ANNUAL REPORTING PREPARED BY:

Yvette Moorhouse
Principal
Fordell School