

# UPPER MOUTERE SCHOOL

## ANNUAL REPORT

FOR THE YEAR ENDED 31 DECEMBER 2020



School Address:	Main Road, Upper Moutere
School Postal Address:	P O Box 38, Upper Moutere, 7144
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Ministry Number:	3229
Accountant/Service Provider:	Accounting for Schools Limited

# UPPER MOUTERE SCHOOL

Annual Report - For the year ended 31 December 2020

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**UPPER MOUTERE SCHOOL**  
Statement of Responsibility  
For the year ended 31 December 2020

The Board of Trustees 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 2020 fairly reflects the financial position and operations of the school.

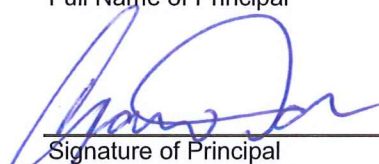
The School's 2020 financial statements are authorised for issue by the Board.

Melody Marr IWAO FUJII.  
Full Name of Board Chairperson

  
Signature of Board Chairperson

31/05/2021  
Date:

Grant Watson  
Full Name of Principal

  
Signature of Principal

31/5/2021  
Date:

# UPPER MOUTERE SCHOOL

## Statement of Comprehensive Revenue and Expense

For the year ended 31 December 2020

	Notes	2020 Actual \$	2020 Budget \$	2019 Actual \$
<b>Revenue</b>				
Government Grants	2	1,239,851	1,204,295	1,200,438
Locally Raised Funds	3	63,210	77,440	90,910
Interest income		8,099	6,000	12,239
		<u>1,311,160</u>	<u>1,287,735</u>	<u>1,303,587</u>
<b>Expenses</b>				
Locally Raised Funds	3	40,705	27,353	65,071
Learning Resources	4	817,266	833,222	763,278
Administration	5	63,179	76,089	66,138
Finance		1,555	-	864
Property	6	389,978	337,124	357,832
Depreciation	7	50,641	50,000	51,711
		<u>1,363,324</u>	<u>1,323,788</u>	<u>1,304,894</u>
<b>Net Surplus / (Deficit)</b>		(52,164)	(36,053)	(1,307)
Other Comprehensive Revenue and Expenses		-	-	-
<b>Total Comprehensive Revenue and Expense for the Year</b>		<u>(52,164)</u>	<u>(36,053)</u>	<u>(1,307)</u>

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

# UPPER MOUTERE SCHOOL

## Statement of Changes in Net Assets/Equity For the year ended 31 December 2020

	Notes	2020 Actual \$	2020 Budget (Unaudited) \$	2019 Actual \$
<b>Balance at 1 January</b>		470,394	470,390	471,701
Total comprehensive revenue and expense for the year		(52,164)	(36,053)	(1,307)
Capital Contributions from the Ministry of Education Contribution - Furniture and Equipment Grant		-	-	-
<b>Equity at 31 December</b>		418,230	434,337	470,394
Retained Earnings		418,230	434,337	470,394
Reserves		-	-	-
<b>Equity at 31 December</b>		418,230	434,337	470,394

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.

# UPPER MOUTERE SCHOOL

## Statement of Financial Position

As at 31 December 2020

	Notes	2020 Actual \$	2020 Budget (Unaudited) \$	2019 Actual \$
<b>Current Assets</b>				
Cash and Cash Equivalents	8	66,961	367,737	333,918
Accounts Receivable	9	61,424	60,000	66,506
GST Receivable		32,821	-	-
Prepayments		3,091	500	404
Inventories	10	197	200	197
Investments	11	297,314	-	333,194
Funds held for Capital Works Projects	18	114,594		(278,261)
		<u>576,402</u>	<u>428,437</u>	<u>455,958</u>
<b>Current Liabilities</b>				
GST Payable		-	38,500	38,867
Accounts Payable	13	222,076	88,000	82,793
Revenue Received in Advance	14	8,840	-	-
Provision for Cyclical Maintenance	15	4,615	2,500	2,296
Painting Contract Liability - Current Portion	16	2,551	2,500	2,551
Finance Lease Liability - Current Portion	17	20,473	15,800	18,234
		<u>258,555</u>	<u>147,300</u>	<u>144,741</u>
<b>Working Capital Surplus</b>		<u>317,847</u>	<u>281,137</u>	<u>311,217</u>
<b>Non-current Assets</b>				
Property, Plant and Equipment	12	202,508	230,000	236,461
		<u>202,508</u>	<u>230,000</u>	<u>236,461</u>
<b>Non-current Liabilities</b>				
Provision for Cyclical Maintenance	15	69,882	28,000	27,973
Painting Contract Liability	16	6,518	11,000	11,052
Finance Lease Liability	17	25,725	37,800	38,259
		<u>102,125</u>	<u>76,800</u>	<u>77,284</u>
<b>Net Assets</b>		<u>418,230</u>	<u>434,337</u>	<u>470,394</u>
<b>Equity</b>		<u>418,230</u>	<u>434,337</u>	<u>470,394</u>

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

# UPPER MOUTERE SCHOOL

## Statement of Cash Flows

For the year ended 31 December 2020

		2020	2020	2019
	Note	Actual	Budget	Actual
		\$	(Unaudited)	\$
		\$	\$	\$
<b>Cash flows from Operating Activities</b>				
Government Grants		297,224	264,295	275,371
Locally Raised Funds		82,362	88,011	82,192
Goods and Services Tax (net)		(71,685)	(369)	31,253
Payments to Employees		(116,264)	(79,797)	(77,860)
Payments to Suppliers		(74,136)	(246,753)	(211,604)
Cyclical Maintenance Payments in the year		(3,854)	(7,869)	(3,745)
Interest Paid		(1,555)	-	(864)
Interest Received		9,446	7,903	10,334
Net cash from / (to) the Operating Activities		121,537	25,421	105,077
<b>Cash flows from Investing Activities</b>				
Purchase of PPE (and Intangibles)		(8,698)	(43,539)	(19,794)
Purchase of Investments		35,880	333,194	(89,652)
Net cash from / (to) the Investing Activities		27,180	289,655	(109,447)
<b>Cash flows from Financing Activities</b>				
Finance Lease Payments		(18,286)	(2,893)	(15,293)
Painting contract payments		(4,534)	(103)	(4,535)
Funds Held for Capital Works Projects		(392,855)	(278,261)	278,261
Net cash from Financing Activities		(415,675)	(281,257)	258,433
<b>Net increase/(decrease) in cash and cash equivalents</b>		<b>(266,958)</b>	<b>33,819</b>	<b>254,063</b>
Cash and cash equivalents at the beginning of the year	8	333,918	333,918	79,855
<b>Cash and cash equivalents at the end of the year</b>	<b>8</b>	<b>66,960</b>	<b>367,737</b>	<b>333,918</b>

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

# UPPER MOUTERE SCHOOL

## Notes to the Financial Statements

### For the year ended 31 December 2020

#### 1. Statement of Accounting Policies

##### **a) Reporting Entity**

Upper Moutere 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 of Trustees (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 reports have been prepared for the period 1 January 2020 to 31 December 2020 and in accordance with the requirements of the Public Finance Act 1989.

###### ***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 expenditure 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.



# UPPER MOUTERE SCHOOL

## Notes to the Financial Statements

### For the year ended 31 December 2020

#### 1. Statement of Accounting Policies

##### ***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 long term maintenance plan which is prepared as part of its 10 Year Property Planning process. During the year, the Board assesses the reasonableness of its 10 Year Property Plan on which the provision is based. Cyclical maintenance is disclosed at note 15.

##### ***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 12.

##### ***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. 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.

##### ***Recognition of grants***

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

# UPPER MOUTERE SCHOOL

## Notes to the Financial Statements

### For the year ended 31 December 2020

#### 1. Statement of Accounting Policies

##### 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.

Use of land and buildings grants are recorded as revenue in the period the School uses the land and buildings. These 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.

###### **Other Grants**

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 recorded as revenue when their receipt is formally acknowledged by the School.

###### **Interest Revenue**

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

##### d) Use of Land and Buildings Expense

The property from which the School operates is owned by the Crown and managed by the Ministry of Education on behalf of 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 expense that is offset by a non-cash grant from the Ministry.

##### e) 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.

##### f) 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.

# UPPER MOUTERE SCHOOL

## Notes to the Financial Statements

### For the year ended 31 December 2020

#### 1. Statement of Accounting Policies

##### **g) 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.

##### **h) Accounts Receivable**

Short-term receivables are recorded at the amount due, less an allowance for 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.

##### **i) Inventories**

Inventories are consumable items held for sale and comprise 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.

##### **j) 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.

##### **k) 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 to buildings owned by the Crown 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.

Property, plant and equipment acquired with individual values under \$1,000 are not capitalised, they are recognised as an expense in the Statement of Comprehensive Revenue and Expense.

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.



# UPPER MOUTERE SCHOOL

## Notes to the Financial Statements

### For the year ended 31 December 2020

#### 1. Statement of Accounting Policies

##### **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 to Crown Owned Assets	10–75 years
Furniture and equipment	10–15 years
Information and communication technology	4–5 years
Motor vehicles	5 years
Textbooks	3 years
Leased assets held under a Finance Lease	4 years
Library resources	12.5% Diminishing value

##### **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. 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.

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.

##### **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 benefits that are due to be settled within 12 months after the end of the period in which the employee renders the related service are measured based on accrued entitlements at current rates of pay. These include salaries and wages accrued up to balance date, and also annual leave earned, by non teaching staff, to but not yet taken at balance date.

# UPPER MOUTERE SCHOOL

## Notes to the Financial Statements

### For the year ended 31 December 2020

#### 1. Statement of Accounting Policies

##### **o) Revenue Received in Advance**

Revenue received in advance relates to fees 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 international students, should the School be unable to provide the services to which they relate.

##### **p) 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 for cyclical maintenance represents the obligation the Board has to the Ministry and is based on the Board's ten year property plan (10YPP).

##### **q) 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 categorised as 'financial assets measured at amortised cost' for accounting purposes in accordance with financial reporting standards.

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.

The School's financial liabilities comprise accounts payable, borrowings and finance lease liability. All of these financial liabilities are categorised as "financial liabilities measured at amortised cost" for accounting purposes in accordance with financial reporting standards.

##### **r) 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.

##### **s) Budget Figures**

The budget figures are extracted from the School budget that was approved by the Board at the start of the year.

##### **t) 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.

##### **u) Shared Funds**

Shared Funds are held on behalf of a cluster of participating schools as agreed with the Ministry of Education. The cluster of schools operate activities outside of school control. These amounts are not recorded in the Statement of Revenue and Expense. The School holds sufficient funds to enable the funds to be used for their intended purpose.



# UPPER MOUTERE SCHOOL

## Notes to the Financial Statements

### For the year ended 31 December 2020

#### 2. Government Grants

	2020 Actual \$	2020 Budget (Unaudited) \$	2019 Actual \$
Operational Grants	261,462	239,805	247,856
Teachers' Salaries Grants	690,220	690,000	671,006
Use of Land and Buildings Grants	252,407	250,000	254,061
Other MoE Grants	35,327	23,490	26,102
Other Government Grants	435	1,000	1,413
	<u>1,239,851</u>	<u>1,204,295</u>	<u>1,200,438</u>

Other MOE Grants total includes additional COVID-19 funding totalling \$4,595 for the year ended 31 December 2020.

#### 3. Locally Raised Funds

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

	2020 Actual \$	2020 Budget (Unaudited) \$	2019 Actual \$
<b>Revenue</b>			
Donations	4,155	9,000	9,101
Activities	29,118	40,640	52,082
Trading	1,994	3,200	2,265
Fundraising	8,185	4,500	8,052
Other Revenue	19,758	20,100	19,410
	<u>63,210</u>	<u>77,440</u>	<u>90,910</u>
<b>Expenses</b>			
Activities	29,690	15,875	50,880
Trading	1,458	2,900	3,751
Fundraising (Costs of Raising Funds)	1,510	1,500	1,200
Other Locally Raised Funds Expenditure	8,047	7,078	9,240
	<u>40,705</u>	<u>27,353</u>	<u>65,071</u>
<i>Surplus/ (Deficit) for the year Locally raised funds</i>	<u>22,505</u>	<u>50,087</u>	<u>25,839</u>

**UPPER MOUTERE SCHOOL**  
Notes to the Financial Statements  
For the year ended 31 December 2020

**4. Learning Resources**

	<b>2020</b>	<b>2020</b>	<b>2019</b>
	<b>Actual</b>	<b>Budget</b>	<b>Actual</b>
	<b>\$</b>	<b>(Unaudited)</b>	<b>\$</b>
Curricular	38,100	81,622	33,977
Equipment Repairs	257	1,150	192
Information and Communication Technology	3,460	2,000	1,133
Library Resources	1,313	3,500	3,269
Employee Benefits - Salaries	768,721	733,350	715,161
Staff Development	5,415	11,600	9,546
	<b>817,266</b>	<b>833,222</b>	<b>763,278</b>

**5. Administration**

	<b>2020</b>	<b>2020</b>	<b>2019</b>
	<b>Actual</b>	<b>Budget</b>	<b>Actual</b>
	<b>\$</b>	<b>(Unaudited)</b>	<b>\$</b>
Audit Fee	1,727	3,564	3,564
Board of Trustees Fees	3,625	3,800	4,045
Board of Trustees Expenses	3,331	1,450	2,646
Communication	4,294	5,944	5,182
Consumables	1,746	1,250	1,911
Operating Lease	54	12,306	1,395
Other	4,553	6,425	6,863
Employee Benefits - Salaries	38,548	35,450	34,702
Insurance	1,444	1,200	862
Service Providers, Contractors and Consultancy	3,857	4,700	4,968
	<b>63,179</b>	<b>76,089</b>	<b>66,138</b>

# UPPER MOUTERE SCHOOL

## Notes to the Financial Statements

### For the year ended 31 December 2020

#### 6. Property

	2020	2020	2019
	Actual	Budget	Actual
	\$	(Unaudited)	\$
Consultancy and Contract Services	35,844	39,000	32,921
Cyclical Maintenance Provision	48,082	8,100	11,907
Grounds	22,620	7,900	25,761
Heat, Light and Water	12,914	21,724	14,085
Repairs and Maintenance	16,644	9,000	17,531
Use of Land and Buildings	252,407	250,000	254,061
Security	1,467	1,400	1,566
	<u>389,978</u>	<u>337,124</u>	<u>357,832</u>

The use of land and buildings figure represents 8% 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. Depreciation

	2020	2020	2019
	Actual	Budget	Actual
	\$	(Unaudited)	\$
Building Improvements - Crown	7,977	8,000	10,296
Furniture and Equipment	13,029	15,000	14,044
Information and Communication Technology	7,942	3,000	10,192
School House	754	1,000	754
Leased Assets	18,517	20,000	13,842
Library Resources	2,422	3,000	2,583
	<u>50,641</u>	<u>50,000</u>	<u>51,711</u>



**UPPER MOUTERE SCHOOL**  
Notes to the Financial Statements  
For the year ended 31 December 2020

**8. Cash and Cash Equivalents**

	2020 Actual \$	2020 Budget (Unaudited) \$	2019 Actual \$
Cash on Hand	-	10	10
Bank Current Account	39,550	40,000	21,049
Bank Call Account	27,411	27,727	25,359
Short-term Bank Deposits	-	300,000	287,500
	<u>66,961</u>	<u>367,737</u>	<u>333,918</u>

Cash and cash equivalents for Cash Flow Statement

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

Of the \$66,961 Cash and Cash Equivalents, \$28,774 is held by the School on behalf of the Ministry of Education. These funds are required to be spent in 2021 on Crown owned school buildings under the School's Five Year Property Plan.

**9. Accounts Receivable**

	2020 Actual \$	2020 Budget (Unaudited) \$	2019 Actual \$
Receivables	5,259	5,000	3,532
Receivables from the Ministry of Education	-	-	12,039
Interest Receivable	558	-	1,905
Teacher Salaries Grant Receivable	55,607	55,000	49,030
	<u>61,424</u>	<u>60,000</u>	<u>66,506</u>
Receivables from Exchange Transactions	5,817	5,000	5,437
Receivables from Non-Exchange Transactions	55,607	55,000	61,069
	<u>61,424</u>	<u>60,000</u>	<u>66,506</u>

**10. Inventories**

	2020 Actual \$	2020 Budget (Unaudited) \$	2019 Actual \$
Stationery	197	200	197
	<u>197</u>	<u>200</u>	<u>197</u>

# UPPER MOUTERE SCHOOL

## Notes to the Financial Statements

### For the year ended 31 December 2020

#### 11. Investments

The School's investment activities are classified as follows:

	2020 Actual \$	2020 Budget (Unaudited) \$	2019 Actual \$
Current Asset			
Short-term Bank Deposits	297,314	-	333,194
<b>Total Investments</b>	<b>297,314</b>	<b>-</b>	<b>333,194</b>

#### 12. Property, Plant and Equipment

	Opening Balance (NBV) \$	Additions \$	Disposals \$	Impairment \$	Depreciation \$	Total (NBV) \$
<b>2020</b>						
Building Improvements	86,891	5,842	-	-	(7,977)	84,756
Furniture and Equipment	50,824	2,070	-	-	(13,029)	39,865
Information and Communication Technology	14,154	-	-	-	(7,942)	6,212
School House	9,397	-	-	-	(754)	8,642
Leased Assets	56,213	7,990	-	-	(18,517)	45,686
Library Resources	18,982	787	-	-	(2,422)	17,347
		-				
<b>Balance at 31 December 2020</b>	<b>236,461</b>	<b>16,689</b>	<b>-</b>	<b>-</b>	<b>(50,641)</b>	<b>202,508</b>

The net carrying value of equipment held under a finance lease is \$45,686 (2019: \$56,213).

	Cost or Valuation \$	Accumulated Depreciation \$	Net Book Value \$
<b>2020</b>			
Building Improvements	253,576	(168,821)	84,756
Furniture and Equipment	222,151	(182,287)	39,865
Information and Communication Technology	63,638	(57,426)	6,212
School House	26,810	(18,166)	8,642
Leased Assets	83,437	(37,750)	45,686
Library Resources	22,353	(5,006)	17,347
<b>Balance at 31 December 2020</b>	<b>671,965</b>	<b>(469,456)</b>	<b>202,508</b>

**UPPER MOUTERE SCHOOL**  
Notes to the Financial Statements  
For the year ended 31 December 2020

**12. Property, Plant and Equipment (Cont.)**

	Opening Balance (NBV) \$	Additions \$	Disposals \$	Impairment \$	Depreciation \$	Total (NBV) \$
<b>2019</b>						
Building Improvements	93,612	3,575	-	-	(10,296)	86,891
Furniture and Equipment	55,704	9,164	-	-	(14,044)	50,824
Information and Communication Technology	18,639	5,707	-	-	(10,192)	14,154
School House	10,150	-	-	-	(754)	9,397
Leased Assets	55,325	14,730	-	-	(13,842)	56,213
Library Resources	20,218	1,347	-	-	(2,583)	18,982
<b>Balance at 31 December 2019</b>	<b>253,648</b>	<b>34,523</b>	<b>-</b>	<b>-</b>	<b>(51,711)</b>	<b>236,461</b>

	Cost or Valuation \$	Accumulated Depreciation \$	Net Book Value \$
<b>2019</b>			
Building Improvements	247,735	(160,844)	86,891
Furniture and Equipment	220,082	(169,258)	50,824
Information and Communication Technology	63,638	(49,484)	14,154
School House	26,810	(17,413)	9,397
Leased Assets	75,446	(19,233)	56,213
Library Resources	75,944	(56,963)	18,982
<b>Balance at 31 December 2019</b>	<b>709,655</b>	<b>(473,195)</b>	<b>236,461</b>

**13. Accounts Payable**

	2020 Actual \$	2020 Budget (Unaudited) \$	2019 Actual \$
Operating Creditors	162,495	30,000	29,202
Accruals	2,192	3,000	3,564
Employee Entitlements - Salaries	55,607	55,000	49,030
Employee Entitlements - Leave Accrual	1,782	-	997
	<b>222,076</b>	<b>88,000</b>	<b>82,793</b>
Payables for Exchange Transactions	222,076	88,000	82,793
	<b>222,076</b>	<b>88,000</b>	<b>82,793</b>

**UPPER MOUTERE SCHOOL**  
Notes to the Financial Statements  
For the year ended 31 December 2020

**14. Revenue Received in Advance**

	2020 Actual \$	2020 Budget (Unaudited) \$	2019 Actual \$
Other	8,840	-	-
	<u>8,840</u>	<u>-</u>	<u>-</u>

**15. Provision for Cyclical Maintenance**

	2020 Actual \$	2020 Budget (Unaudited) \$	2019 Actual \$
Provision at the Start of the Year	30,269	30,269	22,107
Increase/ (decrease) to the Provision During the Year	48,082	8,100	11,907
Use of the Provision During the Year	(3,854)	(7,869)	(3,745)
Provision at the End of the Year	<u>74,497</u>	<u>30,500</u>	<u>30,269</u>
Cyclical Maintenance - Current	4,615	2,500	2,296
Cyclical Maintenance - Term	69,882	28,000	27,973
	<u>74,497</u>	<u>30,500</u>	<u>30,269</u>

**16. Painting Contract Liability**

	2020 Actual \$	2020 Budget (Unaudited) \$	2019 Actual \$
Current Liability	2,551	2,500	2,551
Non Current Liability	6,518	11,000	11,052
	<u>9,069</u>	<u>13,500</u>	<u>13,603</u>

In 2010 the Board signed an agreement with Scheduled Maintenance Services Ltd (the contractor) for an agreed programme of work covering an eight year period. The programme provides for an interior and exterior repaint of the Ministry owned buildings in 2012, with regular maintenance in subsequent years. The agreement has an annual commitment of \$7,085. The liability is the best estimate of the actual amount of work performed by the contractor for which the contractor has not been paid at balance sheet date. The liability has not been adjusted for inflation and the effect of the time value of money.

# UPPER MOUTERE SCHOOL

## Notes to the Financial Statements

### For the year ended 31 December 2020

#### 17. Finance Lease Liability

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

	2020 Actual \$	2020 Budget (Unaudited) \$	2019 Actual \$
No Later than One Year	20,473	15,800	18,234
Later than One Year and no Later than Five Years	25,725	37,800	38,259
	<u>46,198</u>	<u>53,600</u>	<u>56,493</u>

#### 18. Funds Held for Capital Works Projects

During the year the School received and applied funding from the Ministry of Education for the following capital works projects:

	2020	Opening Balances \$	Receipts from MoE \$	Payments \$	BOT Contributions	Closing Balances \$
Ramaroa Upgrade	<i>in progress</i>	278,261	160,625	(415,550)	-	23,336
Block C	<i>in progress</i>	-	61,758	(56,320)	-	5,438
Septic Tank	<i>in progress</i>	-	-	(143,368)	-	(143,368)
Totals		<u>278,261</u>	<u>222,383</u>	<u>(615,238)</u>	-	<u>(114,594)</u>

#### Represented by:

Funds Held on Behalf of the Ministry of Education	28,774
Funds Due from the Ministry of Education	(143,368)
	<u>(114,594)</u>

	2019	Opening Balances \$	Receipts from MoE \$	Payments \$	BOT Contributions	Closing Balances \$
Ramaroa Upgrade	<i>in progress</i>	-	280,000	(1,739)	-	278,261
Totals		-	<u>280,000</u>	<u>(1,739)</u>	-	<u>278,261</u>

# UPPER MOUTERE SCHOOL

## Notes to the Financial Statements

### For the year ended 31 December 2020

#### 19. 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 condition 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.

Heidi Olykan is a Trustee of the Board and also owns Splashworks Plumbing, Gas & Heating Limited. During the year the School contracted Spashworks to provide services. The total value of all transactions for the year was \$45,396 and no amount is outstanding as at balance date (2019: nil).

#### 20. Remuneration

##### *Key management personnel compensation*

Key management personnel of the School include all trustees of the Board, Principal and Assistant Principal.

	<b>2020</b>	<b>2019</b>
	<b>Actual</b>	<b>Actual</b>
	<b>\$</b>	<b>\$</b>
<i>Board Members</i>		
Remuneration	3,625	4,045
Full-time equivalent members	0.08	0.40
<i>Leadership Team</i>		
Remuneration	239,076	244,369
Full-time equivalent members	2	2
Total key management personnel remuneration	<u>242,701</u>	<u>248,414</u>
Total full-time equivalent personnel	<u>2.08</u>	<u>2.40</u>

The full time equivalent for Board members has been determined based on attendance at Board meetings, Committee meetings and for other obligations of the Board, such as stand downs and suspensions, plus the estimated time for Board members to prepare for meetings.

##### *Principal*

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

	<b>2020</b>	<b>2019</b>
	<b>Actual</b>	<b>Actual</b>
	<b>\$000</b>	<b>\$000</b>
Salaries and Other Short-term Employee Benefits:		
Salary and Other Payments	120 - 130	130 - 140
Benefits and Other Emoluments	10 - 20	10 - 20

##### *Other Employees*

There were no other employees with remuneration of greater than \$100,00 (2019: nil).

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



# UPPER MOUTERE SCHOOL

## Notes to the Financial Statements

### For the year ended 31 December 2020

#### 21. Compensation and Other Benefits Upon Leaving

The total value of compensation or other benefits paid or payable to persons who ceased to be trustees, committee member, 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:

	2020 Actual	2019 Actual
Total	-	-
Number of People	-	-

#### 22. Contingencies

There are no contingent liabilities (except as noted below) and no contingent assets as at 31 December 2020 (Contingent liabilities and assets at 31 December 2019: nil).

##### Holidays Act Compliance – schools payroll

The Ministry of Education performs payroll processing and payments on behalf of school boards of trustees, 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. The current phase of this review is to design potential solutions for any compliance breaches discovered in the initial phase of the Programme. 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 2020, a contingent liability for the school may exist.

#### 23. Commitments

##### (a) Capital Commitments

As at 31 December 2020 the Board has entered into contract agreements for capital works as follows:

- (i) To upgrade rooms 5 and 6 at a total cost of \$428,897, which is fully funded by the Ministry. To date \$438,885 has been received and \$415,549 has been spent, and;
- (ii) To upgrade Block C at a total cost of \$68,621, which is fully funded by the Ministry. To date \$61,758 has been received and \$56,320 has been spent, and;
- (iii) To replace septic system at a total cost of \$320,712, which is fully funded by the Ministry. To date no funding has been received and \$143,368 has been spent.

(Capital commitments at 31 December 2019: \$428,897).

##### (b) Operating Commitments

As at 31 December 2020 the Board had not entered into any contracts.



# UPPER MOUTERE SCHOOL

## Notes to the Financial Statements

### For the year ended 31 December 2020

#### 24. Managing Capital

The School's capital is its equity and comprises capital contributions from the Ministry of Education for property, plant and equipment and accumulated surpluses and deficits. The School does not actively manage capital but attempts to ensure that income exceeds spending in most years. Although deficits can arise as planned in particular years, they are offset by planned surpluses in previous years or ensuing years.

#### 25. 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

	2020	2020	2019
	Actual	Budget	Actual
	\$	(Unaudited)	\$
Cash and Cash Equivalents	66,961	367,737	333,918
Receivables	61,424	60,000	66,506
Investments - Term Deposits	297,314	-	333,194
Total Financial assets measured at amortised cost	<u>425,699</u>	<u>427,737</u>	<u>733,618</u>

##### Financial liabilities measured at amortised cost

Payables	222,076	88,000	82,783
Finance Leases	46,198	53,600	56,493
Painting Contract Liability	9,069	13,500	13,603
Total Financial Liabilities Measured at Amortised Cost	<u>277,343</u>	<u>155,100</u>	<u>152,879</u>

#### 26. Events After Balance Date

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



## UPPER MOUTERE SCHOOL

Members of the Board of Trustees

For the year ended 31 December 2020

<b>Name</b>	<b>Position</b>	<b>How position on Board gained</b>	<b>Term expired/expires</b>
Melody Marr	Chairperson	Elected	May 2022
Grant Watson	Principal		
Iwao Fujji	Parent Rep	Elected June 2019	May 2022
Heidi Olykan	Staff Representative	Elected June 2019	May 2022
Jane Chisnall	Parent Rep	Elected	May 2022
Sam Duncan	Parent Rep	Elected	May 2022
May 2022	Parent Rep	Elected	December 2020

## **UPPER MOUTERE SCHOOL**

### **Kiwisport Funding**

**For the year ended 31 December 2020**

Kiwisport is a Government funding initiative to support student participation in organised sport.

In 2020 the School received funding of \$1,879 (2019: \$1,907).

The funding was spent on tuition for gross & fine motor skills, tennis tuition, participation in various sports competitions such as tennis, and Top Team.

The number of students that participated in organised sport varied throughout the year but the funding reached almost all of our 135 students in some capacity.



*confident active creative literate numerate thinker respect responsibility pride*

# **UPPER MOUTERE**

## **SCHOOL**

# Our Plan for Teaching and Learning

**To Strive for Excellence**

**2020- 2022**

**Charter 2020**

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# Upper Moutere School

*We are a well-resourced school with a vibrant learning environment located in the heart of the historic village of Upper Moutere.*

*Our school has a caring, challenging environment where our students are empowered to take ownership of their own learning while being supported by their peers, teachers, family and wider community through planned quality teaching and learning experiences.*

*Our Learning Lights including our school values are embraced by our students, staff and families to help bring our vision to life every day ensuring our students celebrate success across the curriculum with achievement consistently above national expectations. Students also display increasing confidence and achieve well as active, creative, literate, numerate and thinking learners who make good choices, take responsibility, show respect and have pride in themselves, their school and community.*

*Set over two levels the attractively planted grounds provide areas of interest and challenge along with well-equipped learning spaces, a sizeable pool, hall, library, teacher spaces and the oldest working classroom in the country (presently used for a variety of extra-curricular activities). We are proud to have up to date, collaborative, flexible and engaging learning environments for our 120 - 130 students.*

UPPER MOUTERE  
SCHOOL

At Upper Moutere School our *Mission* is to provide a learning environment where our students are empowered to...



## Kahui ako Ki Motueka

This diagram encapsulates where we are heading with the Motueka Kāhui Ako. It will also be a basis for us at Upper Moutere

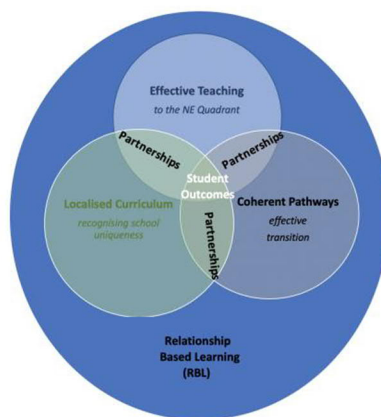
The work undertaken around Relationship Based Learning, supported by the development of Impact Coaching has been a key strategy in working towards our Strategic Aims, in particular

1. All students Achieving their best
2. All Students demonstrating inquiring minds and diligently engaged and responsive to their own learning
3. High expectation of student success and commitment to professional learning

There is a strong research basis through Dr Russel Bishop's work (Culture Counts) that identifies the significant link between pedagogies promoted through the RBL Profiles and increased student achievement, but these are less visible over the timeframe of our involvement so far. We have identified that:

1. Writing and Mathematics will be the Target Areas for 2020

Moving forward, our Strategic Aims above will be progressed through the revised Kahui Ako Achievement Challenge Plan as we look to embed the RBL and Impact Coaching practices and grow into areas of Effective Teaching, Transition Processes and Localised Curriculum.



## Excellent Literacy and Numeracy

*All Students achieving their best*

Indicators of Achievement	2020	2021	2022
<ul style="list-style-type: none"> <li>• High expectations of all students</li> <li>• Raised student achievement in literacy and numeracy in all year groups</li> <li>• Achievement reported to parents/caregivers in writing, including student voice, twice a year</li> <li>• All students confidently and competently reading a wide variety of genre for pleasure and information</li> <li>• All students to be able to write confidently and competently in a variety of ways to express themselves to be understood</li> <li>• All students able to confidently and competently apply mathematical knowledge and strategy in authentic mathematics problems</li> <li>• All students confidently and competently able to access</li> </ul>	<ul style="list-style-type: none"> <li>• Effective assessment data will be gathered to evaluate the progress and achievement of students in relation to the National Standards</li> <li>• Improve writing achievement in relation to the NZC in areas identified by 2019 Internal Evaluation</li> <li>• Improve reading achievement in relation to the NZC in areas identified by 2019 Internal Review</li> <li>• Improve mathematical achievement in relation to the NZC in areas identified by 2019 Internal Review</li> <li>• Continue to focus on the improvement of Boys achievement in relation to the NZC in areas identified by 2019 Internal Review</li> <li>• Continue to focus on the achievement of Maori in relation to the NACin areas</li> </ul>	<ul style="list-style-type: none"> <li>• Effective assessment data will be gathered to evaluate the progress and achievement of students in relation to the NZ Curriculum</li> <li>• Improve writing achievement in relation to the NZC in areas identified by 2020 Internal Evaluation</li> <li>• Improve reading achievement in relation to the NZC in areas identified by 2020 Internal Evaluation</li> <li>• Improve mathematical achievement in relation to the NZC in areas identified by 2020 Internal Review</li> <li>• Continue to focus on the improvement of Boys achievement in relation to the NZC in areas identified by 2020 Internal Review</li> <li>• Continue to focus on the achievement of Maori in</li> </ul>	<ul style="list-style-type: none"> <li>• Effective assessment data will be gathered to evaluate the progress and achievement of students in relation to the National Standards</li> <li>• Improve writing achievement in relation to the NZC in areas identified by 2021 Internal evaluation</li> <li>• Improve reading achievement in relation to the NZC in areas identified by 2021 Internal Evaluation</li> <li>• Improve mathematical achievement in relation to the NZC in areas identified by 2021 Internal Review</li> <li>• Continue to focus on the improvement of Boys achievement in relation to the NZC in areas identified by 2021 Internal Review</li> <li>• Continue to focus on the achievement of Maori in</li> </ul>

<p>relevant technology to achieve success.</p> <ul style="list-style-type: none"> <li>• Maori and Pacifica students are engaged in their learning and are achieving success with pride in their unique identity, language and culture</li> <li>• All reasonable steps are taken to provide instruction in Tikanga and Te Reo Maori for full-time students whose parents request it.</li> <li>• Students with social learning needs are supported in their learning so they can progress in relation to the New Zealand Curriculum, participating and contributing fully within the school to the best of their ability.</li> </ul>	<p>identified by 2019 Internal Evaluation</p> <ul style="list-style-type: none"> <li>• Should a higher level of Tikanga and or Te Reo be requested, suitable options will be willingly explored</li> <li>• Consult ECE re readiness for school</li> </ul>	<p>relation to the National Standards in areas identified by 2020 Internal Evaluation</p> <ul style="list-style-type: none"> <li>• Should a higher level of Tikanga and or Te Reo be requested, suitable options will be willingly explored</li> </ul>	<p>relation to the National Standards in areas identified by 2021 Internal Evaluation</p> <ul style="list-style-type: none"> <li>• Should a higher level of Tikanga and or Te Reo be requested, suitable options will be willingly explored</li> </ul>
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## Excellent Critical, Creative and Active Thinkers

*All Students demonstrating inquiring mind and diligently engaged and responsive to their own learning*

Indicators of Achievement	2020	2021	2022
<ul style="list-style-type: none"> <li>• High expectations of all students</li> <li>• All students actively involved in their learning – agentic participating with confidence in a variety of activities</li> <li>• All students developing collaborative skills</li> <li>• All students living by our school values</li> <li>• All students demonstrating a growth mind-set through effective questioning and research</li> <li>• All students expressing their creativity in a variety of ways</li> <li>• e-learning embedded across the school</li> <li>• Career Education for Years 7/8</li> <li>• A safe stimulating environment where health and s wellbeing of the whole child is paramount</li> <li>• Maori and Pacifica students are engaged in their learning</li> </ul>	<ul style="list-style-type: none"> <li>• Continue to expand and embed the Learning Process and Learning Pit</li> <li>• Align Growth Mind-set with our Learning Process across the school</li> <li>• Implement Digital Literacies</li> <li>• Explore content that enhances Education outside the classroom and Bicultural/multi-cultural experience</li> <li>• Re-educate re BYOD and include Year 4 up.</li> <li>• Continue to develop student leadership opportunities across the school in relation to RBL</li> <li>• Continue to develop collaboration and agentic learning through authentic experiences through greater student input/choice</li> <li>• Develop a Native Tree Nursery as a sustainable</li> </ul>	<ul style="list-style-type: none"> <li>• Embed and integrate Digital Literacies Programme</li> <li>• Continue to explore content that enhances Education outside the classroom and Bicultural/multi-cultural experience</li> <li>• Continue to develop student leadership opportunities across the school in relation to RBL</li> </ul>	<ul style="list-style-type: none"> <li>• Sustain Digital Literacies Programme</li> <li>• Continue to develop and enhance collaborative and agentic learning opportunities</li> </ul>

<p>and are achieving success with pride in their unique identity, language and culture</p> <ul style="list-style-type: none"><li>• Students with special learning needs are supported in their learning so they can progress in relation to the New Zealand Curriculum, participating and contributing fully within the school to the best of their ability.</li></ul>	<p>authentic learning opportunity.</p>		
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## Excellent Leadership and Teaching

*High expectation of student success and commitment to professional learning*

Indicators of Achievement	2020	2021	2022
<ul style="list-style-type: none"> <li>• Effective leadership across the school that, inspires, guides and supports learning</li> <li>• Leadership is sought, supported and is sustainable</li> <li>• Leadership opportunities are encouraged and supported</li> <li>• Teachers with high expectations of student success</li> <li>• Teachers able to fulfil the school Vision and Values</li> <li>• Teachers who are inspiring, reflective educators, coaches, mentors – facilitators of collaborative learning</li> <li>• Teachers whose programmes consistently reflect effective practice</li> <li>• A focused Professional Learning Programme</li> <li>• High quality applicants for positions</li> <li>• High quality recruitment process</li> <li>• Actively engaged in COL</li> </ul>	<ul style="list-style-type: none"> <li>• Focus on Mathematics and Writing- Target goals</li> <li>• Focus on Digital Literacy implementation across the school</li> <li>• Embed RBL into our school curriculum documentation ... Agentic learners and student voice with authentic learning programmes – co-construction and power sharing</li> <li>• Showcase our achievements in a variety of ways</li> <li>• Review Reporting Format to be readily accessible to parents. Assessment shared when it is taken and collated to become the written report.</li> </ul>	<ul style="list-style-type: none"> <li>• Focus on Mathematics and RBL – Target goals</li> <li>• Encourage other staff to take roles in the Kahui Ako</li> <li>• Goals from Community Consultation</li> <li>• Collaborative Teaching and Learning Review</li> <li>• Be forward thinking re Roll related issues</li> </ul>	<ul style="list-style-type: none"> <li>• Leadership opportunities</li> <li>• See opportunities for further PLD re our Teaching and Learning especially in relation to our environment and community expectations</li> </ul>

	<ul style="list-style-type: none"><li>• Community Consultation Undertaken</li><li>• Review Collaborative Teaching and Learning</li></ul>		
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# Excellent Community Engagement

*Actively seeking and responding to parental input and direction to meet our community's needs*

Indicators of Achievement	2020	2021	2022
<ul style="list-style-type: none"> <li>• High expectations of positive community involvement</li> <li>• Cultural diversity represented within the school and wider community</li> <li>• A welcoming inclusive environment</li> <li>• Parents engaged in and positively supporting their child's learning</li> <li>• Regular parent education opportunities</li> <li>• Parents helping within the school</li> <li>• Parents supporting sports teams</li> <li>• Positive relationships with cluster schools</li> <li>• Positive relationships with contributing preschools</li> <li>• An active and supportive SUMS</li> <li>• School occasions well supported</li> <li>• Effective communication through a variety of media</li> </ul>	<ul style="list-style-type: none"> <li>• Re-invigorate SUMS or similar</li> <li>• Develop with SUMS a programme of activity that balances fundraising and community</li> <li>• Reintroduce New Parent Communication</li> <li>• Development of the school Native Nursery to provide long term input into the community</li> <li>• Kahui Ako goals are to the forefront of our school goals</li> <li>• Review Reporting to Parents</li> <li>• Replace School Stream with @School App</li> <li>• Parent Education in Target Areas Mathematics/RBL and writing</li> </ul>	<ul style="list-style-type: none"> <li>• Continue to develop a Community database of learning opportunities using local resources</li> <li>• Ensure the programme developed with SUMS is undertaken and further developed</li> <li>• Parent Education in Target Areas.</li> </ul>	<ul style="list-style-type: none"> <li>• Continue to build on Community involvement in the school ensuring the school is also an active part of the community</li> <li>• Continue to grow SUMS – parent involvement, succession</li> <li>• Parent Education in Target Areas</li> </ul>

## Excellent Resource

*Optimising our resources to achieve educational excellence*

Indicators of Achievement	2020	2021	2022
<ul style="list-style-type: none"><li>• Quality resources that are engaging and relevant to meet the needs of every 21<sup>st</sup> Century learner</li><li>• Safe, healthy, inspiring, flexible and collaborative learning environments that enable students to be agentic</li><li>• A well-resourced, vibrant library</li><li>• Responsible and prudent management of resources to meet identified needs, including fund-raising</li></ul>	<ul style="list-style-type: none"><li>• Consolidate BYOD at the senior level to further enhance e-learning opportunity</li><li>• Continue to develop safe and effective resourcing of digital citizenship</li><li>• Upgrade of Ramaroa nui and iti and effected hall areas</li><li>• Repaint Hall interior</li><li>• Upgrade Library review staffroom layout.</li></ul>	<ul style="list-style-type: none"><li>• Mobile library shelving and Resource storage upgrade</li><li>• Review 1:2 ratio of devices Year 3 and above</li></ul>	<ul style="list-style-type: none"><li>• Resource upgrade of iMacs/compare use of desktop with laptops</li></ul>

## Excellent Governance

*Proactive, supportive, connected Board of Trustees who are bold and maintain positive momentum*

Indicators of Achievement	2020	2021	2022
<ul style="list-style-type: none"> <li>• Board of Trustees with high expectations of student success</li> <li>• High levels of trust between Board and principal</li> <li>• Highly effective Staff/Board interaction</li> <li>• Alignment of Board culture and action reflecting the vision of the school</li> <li>• The Governance Manual is a “living document” providing direction</li> <li>• Strategically focussed Board meetings</li> <li>• Strategically measured progress and monitored outcomes, through regular internal evaluation</li> <li>• A comprehensive annual internal evaluation including a Board internal evaluation.</li> <li>• Regular reporting by the Principal to the Board on student achievement to identify needs, trends and monitor progress (see Review and Reporting Schedule)</li> </ul>	<ul style="list-style-type: none"> <li>• Undertake an internal Board evaluation beginning of Term2.</li> <li>• Investigate further BOT training opportunities based on review/ needs</li> <li>• Review Charter/Strategic Plan 2020-2022 as per review cycle</li> <li>• Ensure community consultation goals are included</li> <li>• Review Annual Plan – ongoing</li> <li>• Investigate School Docs</li> <li>• Continue to Support Priority Learner acceleration</li> </ul>	<ul style="list-style-type: none"> <li>• Review Annual Plan – ongoing</li> <li>• Review Policy as per review cycle</li> <li>• Review Charter/Strategic Plan 2020-2022 as per review cycle</li> </ul>	<ul style="list-style-type: none"> <li>• Review Annual Plan – ongoing</li> <li>• Review Policy as per review cycle</li> <li>• Review Charter/Strategic Plan 2021-2023 as per review cycle</li> <li>• Ensure BOT succession planning</li> </ul>

<ul style="list-style-type: none"><li>• This data will be used to establish Targets, seek appropriate professional learning, establish appraisal goals and set budget for necessary resourcing</li><li>• Reported school-level data, based on moderated Overall Teacher Judgements in relation to the NZC, the Boards Annual report to MOE</li><li>• Ongoing needs based, relevant, quality professional learning for all Board of Trustees</li><li>• Regular reporting to the Board by Principal on Health and Safety</li></ul>			
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# Annual Plan 2020

## Strive for Excellence in ... Literacy and Numeracy and Creative, Active, Thinkers

**Improve Student Achievement through:** Our School Curriculum Targets for 2019

**To be Confident, Active, Literate, Creative, Thinkers ....**

<p>1. Mathematics Through Professional Learning and peer support embed the Programmes developed through ALiM PLD 2019 below</p> <p>2. Writing Through Professional Learning and peer support revisit Programmes developed in prior years that were successful and sustain these.</p>		
How to be Achieved	By Whom	Time Frame
See Target below GPILSEO	Cathy Ellis Toby Ammundsen and Heidi Olykan Leadership	Throughout the year
<p>Heidi is leading a review of where we are at with these areas. After lockdown teachers have gradually reintroduced the various programmes they had established. Our Focus as a staff has been on our RBL PLD as we determined Relationships was the greatest need after lockdown on returning to school.</p> <p>Term Three data identified a number of students who had been achieving 'on the cusp' prior to Lockdown as achieving below the expected level. Teachers revisited the ALiM approach for these students with more intensity and we now have 84% achieving At or Beyond.</p>		

<p>2. RBL To further develop and sustain practices using "Teaching ro the North East" as our guide</p>		
How to be Achieved	By Whom	Time Frame
WSTs to develop Staff Curriculum Meeting Programme identifying specific areas of the text as a focus over a Year Programme	Julianne Dowell and Heidi Olykan– Within School Teachers	Throughout the year
<p>Regular Staff Curriculum Meetings with RBL focus using the shared text have been very well received. Staff have been able to quickly bring new staff 'up to speed' on the RBL profile. Having the text to support PLD has been extremely valuable, creating further clarity and certainly igniting great discussion.</p> <p>The recent Voice Collection certainly indicated the positive gains we have made as a school. The student voice in particular was a standout. The deeper understanding of their agency and approach to learning was noticeable. The update of the approach by new staff supported by the WST</p>		

has also been seamless. Teachers value the Impact Coaching approach and this will be sustained for 2021 with the WST planning to make the next step towards sustainability mid-year.

3. Reporting to Parents Develop a Real-time approach to reporting to parent using the new @ school app through e Tap		
How to be Achieved	By Whom	Time Frame
<ul style="list-style-type: none"> <li>• Real- Time reporting integrated seamlessly with Assessment. Term One and Three Reporting will be a collation of Real-time reporting along with Student voice and general comment</li> <li>• eTap face to face PLD</li> <li>• Staff to develop an Assessment Overview identifying what assessment are to be undertaken each term and how these will be shared in Real-Time</li> <li>• Can reporting be collated Term 3 to Term 3</li> </ul>	Principal and DP Staff	Ready for Term 1 reporting        Week three Term One
<p>This has been quite frustrating. We had completed our first full day PLD the week prior to Lockdown and staff were ready to post two comments on the actual days after we went into lockdown. It was decided not to post these as parents were being bombarded with ‘new’ distance learning approaches and it was felt they did not need something new.</p> <p>As it transpired the infrastructure behind the tool was not set up for our school anyway so we could not have posted anyway!</p> <p>Since returning to Level 1 we have undertaken our second day of PLD and have now posted General, Reading, Writing and student voice comment re Responsibility. By the end of Term Three a comment in Mathematics and Our Learning Process will be added.</p> <p>At Students-led Conferences teachers were asked to check in with parents re accessing our reporting process. Only one parent across the school asked about reporting and that was to clarify which icon they were to view it on the APP.</p> <p>As yet e-Tap have not published our specific report format so we have asked for a generic one to made available in the meantime for our Year 8 parents in case the Secondary School request a report.</p> <p>We re also working with eTap to alleviate some of the ‘glitches’ in the app.</p>		

Frustratingly this has not been as successful as we had planned. There still seems to be some glitches in the platform which can hinder parental access. We will continue this approach in 2021 but we will need to sort the access problems. The concept is good. Is it less work for the teachers I think not but what can be shared is more timely and authentic.

4. Digital Literacy – Develop a programme that meets the needs of the both the curriculum and our students		
How to be Achieved	By Whom	Time Frame
<ul style="list-style-type: none"> <li>Initial PLD for 4 staff</li> <li>Develop a school programme with Overview, expectations and resourcing</li> <li>Planned Staff Curriculum Meeting with Practical</li> </ul>	Heidi, Rachael, Dylan and Grant Staff	PLD with Natalie Tubman week 3 term One  Week three Term One
<p>A very successful PLD day was hosted by us early in Term 1. From this we were exposed to a variety of teaching and learning possibilities across the school.</p> <p>From this we were able to purchase various equipment to assist in the delivery of a school wide programme.</p> <p>Heidi and Grant created a Digital Literacy Overview using the same format as the other curriculum areas and shared this and the resources with staff. During Lockdown these resources were well utilised by the onsite teachers with the small groups to familiarise themselves with their potential.</p> <p>Heidi, Dylan and Jaki attended a day PLD in Term three which helped develop further teacher capability. They will be able to support other staff as we continue to develop our whole school programme.</p>		

5. Native Tree Nursery To provide an authentic, sustainable, community-based programme in our school		
How to be Achieved	By Whom	Time Frame
<ul style="list-style-type: none"> <li>Investigate Grants to allow for staffing to help present a programme to grow staff and student awareness and knowledge of plants and planting</li> </ul>	Teacher responsible (0.5unit)	Throughout the year

<ul style="list-style-type: none"> <li>• Investigate Grants to allow for the building of a shade house and purchase of relevant equipment</li> <li>• Develop an annual programme the involves seeding gathering, growing and planting around community</li> <li>•</li> </ul>		
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We currently have a partially developed potting shed and shade house. Mel Wilmott has been employed 4 hours a week to deliver a programme to initiate students' interest in native planting.

Being part of the Moutere Catchment, we will possibly benefit from some funding provided by their successful bid for the Billion Trees project. SIP funding has been allocated to the building of the Shade house and Potting Shed where needed to the total of \$6,000.

The Potting Shed and Shade house were finally completed last Term three. The practical planting of seedlings was undertaken and now we have a shade house that is already full. We have been providing a Grant that will help us to fund Mel for part of the year. He teacher in Charge will need to lead staff to develop a programme in 2021. We need to take ownership of the approach we ar taking to this authentic local curriculum initiative.

6. Careers Education Provide a programme that promotes careers education goals based on our local community		
How to be Achieved	By Whom	Time Frame
<ul style="list-style-type: none"> <li>• With Ngatimoti staff develop a programme that meets the goal above</li> </ul>	Year7&8 Teachers	Term 1 and 2?

Again lockdown curtailed the planned visit to Pics which was to be the start of a planned programme. The trip did go ahead after lockdown but with both the juggle to settle back into routine and also continue to provide a varied stimulating programme for our Year 7/8 this programme has had to be put on hold.

The senior students visited Pic however due to other commitments were unable to fulfil the programme. Careers Education took a different approach with individual research and presentations

7. Creatives in School Years 6-8 students will explore their family history, and traditions in their own heritage, that relate to fibre arts. To do this they can use their families documented and oral histories and then expand the research to explore the uses of stitch in their cultural heritage.

How to be Achieved	By Whom	Time Frame
<p>Each student would create their own wall hanging that would be like a contemporary sampler / shield representing them today, acknowledging their cultural heritage and honouring the local environment.</p> <p>Through the creativity of embroidery and stitch work as therapy, children will practise relaxation, mindfulness and focus, as well as developing cross body movements. Slow stitch movements seeks to help people focus on creativity and allow children to see what they create as a legacy.</p>	<p>Fleur Woods Artist in Residence ( Creatives in School Grant) Year 7&amp;8 Teachers</p>	<p>Term 1</p>
<p>This programme has been completed despite being interrupted by Lockdown. We have been very fortunate to have had Fleur both initiate, apply successfully and deliver this programme. Her leadership, flexibility, patience and enthusiasm along with her skill and passion was share with our students producing works from all our students. She was able to inspire and work alongside every student so they felt successful and took them through the process of an artist.</p>		

## Strive for Excellence in ... Leadership and Teaching

*Improve Student Achievement through:*

1. Provide specific opportunity for staff to take leadership roles eg SENCO/ORS teachers, Management Team, Learning Area Leader and Sport

How to be Achieved	By Whom	Time Frame
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Established roles Deputy Principal JD review SENCO/ORS Julieanne Sports Co-ordinator- Cathy Within School Teachers – Julieanne, ALiM, Cathy/ Heidi Reading Recovery - Jaki	Principal Curriculum Leaders	Throughout Year
Further to these established roles we have PE/Sport Native Tree Nursery– Toby E-Learning Dylan Heidi enrolled in a middle leadership programme provided by Hieke- NPA Dylan, Jaki and Heidi enrolled in a Digital Learning PLD		
2. First Aid training for these staff require qualification updating.		
Heidi, Saree, Julieanne, Bridget, Dylan ,Toby, Rachael		

3. Review EEO Documentation
Complete

## Strive for Excellence in Community Engagement

### Improve Student Achievement through:

1. Continue to develop greater parent involvement in student learning with particularly Focus Learners		
How to be Achieved	By Whom	Time Frame
Through a variety of planned interactions Effectiveness of these monitored at Priority Learner Meetings	Principal Teachers Teacher Aides	Term by Term Goals
The year started well with this. Term Two saw us focus generally on Well-being on our return from Lockdown Term three our Focus Learner Meetings are back to their regular weekly sharing.		

2. Planned Parent Education in Mathematics and Writing		
How to be Achieved	By Whom	Time Frame
Establish a timetable for parent education	Principal Lead Teachers	Term 2 and 3
Not achieved		

4. Reinvigorate SUMS and New Parent Communication		
How to be Achieved	By Whom	Time Frame
Seek greater parent support for Fundraising and events Develop with them a sustainable programme balancing Community and Fundraising	Principal Board of Trustees	All year
Not achieved to date... The Working Bee was very heartening. How can we continue to build on this 'community working together' to achieve our goal as a school? The Community Consultation hopefully draws the same enthusiasm.		

## Strive for Excellence in ... Resources

### Improve Student Achievement through:

1. Continue to investigate further avenues of funding outside the Operations Grant		
How to be Achieved	By Whom	Time Frame
Support SUMS Investigate application for Grants for Native Tree Nursery Programme	Principal Board of Trustees SUMS	Throughout the year
Although this has not been the actual focus of the work that Fuji is leading. This work will possibly highlight areas/ a process/ develop a register etc where we can seek financial support		

2. Ramaroa iti and nui Upgrade, Including Alarms, Explore possible other areas? The latter may come from Community Consultation
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How to be Achieved	By Whom	Time Frame
5YA Planned Upgrade	Board Principals Staff Students Property Manager	Term 1, Plans finalised and drawn
Complete LSC Meeting Room currently underway		

3 . Annual Review Crisis, Civil Defence, Pandemic and Lockdown Procedure
Complete ... note despite having a Pandemic Plan, really this was made redundant as the MOE and MOH stepped in to provide very detailed advice, support and direction.

## Strive for Excellence in .... Governance

### Improve Student Achievement through:

1. Continue the regular cycle of Board Self Review in all key areas, with reviews in Term 2 and 4
School Docs will support us to achieve this more effectively.

2. Successful Community Consultation		
How to be Achieved	How to be Achieved	Time Frame
To follow best practice, provide an opportunity for face to face feedback and feed forward	Board	Term 2 or 3
Completed. Although less numbers than hoped the message was very consistent clear. The message was also consistent with the Voice gathered by Cognition as part of the Kahui ako work and Principals Appraisal 360		

3. Investigate School Docs		
How to be Achieved	How to be Achieved	Time Frame



Meet with other Boards using the tool Meet with School Docs Budget	Board	
The Questionnaire is now complete. Held up as our curriculum Document was unreadable when uploaded and needed to re published!		

4. Complete Strategic Plan 2021- 2023
The Board have spent time at two meetings drafting a new Strategic Plan using the four areas identified in the Education and Training Act 2020. This will be ongoing in 2021.

4. <i>Major Curriculum Review in Writing and Learning Process</i> <i>Minor Curriculum Review in Health, PE</i> <i>Administration Review in Organisation; Timetabling, Classes, Procedures Manual</i>
Completed



## Annual Targets 2020

### STUDENT ACHIEVEMENT ANNUAL TARGETS:

#### 2020 Annual Plan

<b>Vision</b>	<b>LITERATE THINKER</b>	
<b>Target Area</b>	<i>English - Writing</i>	
<b>Strategic Goal</b>	We will lift achievement for the 11 students identified 2019 under achieving 'To accelerate achievement of at least 50% of these 'underachieving' students to 'achieving' by end of 2020'	
<b>Historical Position</b>	We have identified a group of 12 students across the school who have despite interventions over the past year, have not sustained progress that was expected.	
<b>GPILSEO tool: 2020</b>	<b>AREA: Engagement and Achievement</b>	
	<b>Implementation</b>	<b>Who and When</b>
Goal: Increase engagement and achievement of boys and their writing	Collect Student Voice from boys in focus group (year 5-7) What do they enjoy writing about? How do they enjoy writing? (with peers, pencil and paper, device, small groups, whole class, with boys only? How do you know you are doing well in writing? Why do you think you need writing?	Lead teacher/classroom teachers Boys – sample group in Years 5-7 Term 1 – before mid term.

## STUDENT ACHIEVEMENT ANNUAL TARGETS:

### 2020 Annual Plan

<p><b>Pedagogy:</b> Provide non-threatening opportunities for children to share openly and honestly with teachers about their writing experiences</p>	<p>Invite participation from students. Establish safe environment (names not recorded, opportunities to record answers and/or share verbally, opportunities to share with someone other than a teacher?) Boys to identify next steps – How? Rubrics? Feedback on previous writing? Shared expectations? Individual Learning Pathway with goals? Clearly outline expectations – share questions first and what and how this information will be used.</p>	<p>Principal / Lead Teacher/Classroom Teacher As appropriate for specific children – may require someone who is not the classroom teacher to collect voice. Term 1 Before mid term  Boys Year 5-7 and Lead teacher/classroom teachers. Establish learning pathways / goals/net steps with boys. How will they be measured? Visual?</p>
<p><b>Institution:</b> Ensure all staff have buy in. An expectation that we are all learning together.</p>	<p>Presented as ‘what we are all going to be doing’ Staff meeting slots – regular and ongoing, where staff can share what changes they have made and what strategies they are using. Link to RBL profile – co-construction, power sharing and feedback strategies. Student voice share openly and honestly with staff – transparent.</p>	<p>Lead Teacher Term 1 and ongoing All Staff (including Teacher Aides)</p>
<p><b>Leadership:</b> Lead Teacher initially – supported by Principal</p>	<p>Lead Teacher initially to organise and facilitate student voice collection and sharing of voice.</p>	<p>Lead Teacher Classroom teachers (Marama and Turama) Term One</p>

## STUDENT ACHIEVEMENT ANNUAL TARGETS:

### 2020 Annual Plan

<p>All Staff (including Teacher Aides)</p>	<p>Focus on boys in year 5-7 (Marama and Turama) whole class approach or small group approach? (discussed with boys who are focus group)          Making writing 'fun'. Engaging topics, real life contexts, created activities, models of writing, word banks, visual prompts, starters etc. As discussed and shared with learner group.          Concise feedback and opportunities to respond.          How does leadership look in the future? How are all staff included in this?</p>	<p>Boys in year 5-7 Focus group (Boys who are underachieving or all boys or whole class? – as determined by focus group and student voice)</p> <p>All staff involved in discussion and sharing of information and feedback.</p>
<p>Spread:  Initially in senior rooms (Turama and Marama) where focus children are. Whole school focus and implementation</p>	<p>Share expectation around what writing sessions 'look like' in our school – specifically for boys in our school.          Get student voice -what does writing look like for boys in Upper Moutere.          Invite boys to share with Teachers?</p>	<p>Term 2/3</p> <p>Lead Teacher Classroom teachers</p> <p>Boys Y5-7</p>
<p>Evidence: Understanding of boys and their learning. Understanding or rubrics/writing process/assessment information Reflection on and changes in teacher practice.</p>	<p>Reflection on student voice from boys.  Rubrics reflected on and highlighted. Reflection/analysed back on writing and responses.</p>	<p>Boys Year 5-7</p> <p>Lead teacher</p> <p>Staff</p>

## STUDENT ACHIEVEMENT ANNUAL TARGETS:

### 2020 Annual Plan

	Individual learning pathways Data analysis regularly shared at Staff Meetings.	Lead teacher and classroom teachers.
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Ownership; All Staff	Rewrite/develop documentation to reflect curriculum expectations for Writing.	Lead teacher supported by all staff.
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Reflection:

PLD - Sheena Cameron presents on effective Writing programmes throughout NZ and Australia. Her next NZ workshop is in Auckland on March 27, 12020  
 PLD – Yolanda Sorryl – Junior staff and one TA

Useful resources to note:

Russell Biship Teaching to the North East <https://www.nzcer.org.nz/nzcerpress/books/teaching-north-east>  
[https://www.educationcounts.govt.nz/ data/assets/pdf file/0018/107109/BES-Examp1ar3.pdf](https://www.educationcounts.govt.nz/data/assets/pdf_file/0018/107109/BES-Examp1ar3.pdf)  
<https://success-for-boys.tki.org.nz/Teaching-learning-resources>  
<https://www.ero.govt.nz/assets/Uploads/Keeping-children-engaged-and-achieving-in-writing.pdf>  
 This work will be the focus of our RBL PLD so will dovetail.

#### Writing Data

This data is a snapshot at the end of Week 6, just prior to Lockdown and Week 2 Term 4

#### Term 1 Writing OTJ 2020

Result	Num pupils	Boys	Girls	Boys%	Girls%
Learning towards	19	11	8	17.7%	13.8%
Learning at	73	41	32	66.1%	55.2%
Learning beyond	28	10	18	16.1%	31.0%

## STUDENT ACHIEVEMENT ANNUAL TARGETS:

### 2020 Annual Plan

**Total Learning AT or BEYOND 87%**

#### Term 4 Writing OTJ 2020

Result	Num pupils	Boys	Girls	Boys%	Girls%
Learning towards	20	12	8	17.6%	12.3%
Learning at	88	47	41	69.1%	63.1%
Learning beyond	25	9	16	13.2%	24.6%

**Total Learning AT or BEYOND 88%**

**Comment:**

**Term One:** Writing achievement continues to be positive at 87% Achieving at a level of or above expectation. This is the same as at Term 3 2019.

How can we move some of the boys achieving 'At' to 'Beyond'? Staff are identifying what it is that some boys need to show consistently in their writing to achieve this. It must be said that the criteria as students move through the curriculum levels is increasingly prescriptive and need to be questioned as to their relevance to assessing an effective writer who can convey their message to the majority.

All the students identified as "Learning Towards" are on our Focus Learner Register and are receiving extra support/ identified programmes. One of the students, a girl, has now been assessed as 'Learning At', but this has not been adjusted above as this data was a snapshot for March. Three of the students "Learning Towards" are Maori

**Term Four:** We have retained the same achievement level as Term One. However we must take into account that we have a total of 13 additional students assessed here. In just our senior learning space we have had three new students join us and two of them are Learning Towards across all three learning areas reported here.

Some students Beyond are now achieving At.

**General:**

## STUDENT ACHIEVEMENT ANNUAL TARGETS:

### 2020 Annual Plan

We have only partially met our target. We have been able to move a small number of the identified students. However a positive is there has been a noticeable shift in student agency. This is particularly articulated in the Year 7/8 learning space. Students who are underachieving for attitudinal approaches are actively reminded of expectation with scaffolded goals shared. Student voice re the type of writing, the purpose and the context were not as we expected, especially under achieving boys! The idea of great emphasis in transactional writing was rebuffed from their voice.

Teachers are very aware, and skilled to continue to foster writing skills and achievement through focussed teaching and support of their learners.

## STUDENT ACHIEVEMENT ANNUAL TARGETS:

### 2020 Annual Plan

<b>Vision</b>	<i><b>NUMERATE THINKER</b></i>	
<b>Target Area</b>	<i>Mathematics</i>	
<b>Strategic Goal</b>	We will continue to embed the ALiM approach adopted in 2019 to lift achievement for the 9 students identified 2019 under achieving 'To accelerate achievement of at least 50% of these 'underachieving' students to be 'achieving' by the end of 2020	
<b>Historical Position</b>	We have identified a group of 9 students across the school who have not as yet 'achieved to expectation'. A number of these made positive progress through	

## STUDENT ACHIEVEMENT ANNUAL TARGETS:

### 2020 Annual Plan

	ALiM. We intend to continue this programme in our collaborative spaces.	
<b>GPILSEO tool: 2020</b>	<b>AREA: Achievement. Nine children across the school have shown progress but remain under-achieving in Mathematics</b>	
	<b>Implementation</b>	<b>Who and When</b>
Goal: Raise the achievement of 9 students identified as underachieving in Mathematics	Establish a planned programme, ensuring that current teaching aligns with this. Apply elements of ALiM practises from 2019 PD. Apply strategies of RBL Profile – Feedback, Feed forward, power sharing and constructing a family like context. Student voice collected.	2 x year 7 students and 1 s year 8 in Marama. 3 x year 6 students, 1 x year 5 student and 1 x year 4 student in Turama 1 x year 3 student in Ramaroa Nui Cathy – continue in Ramaroa Nui. Curriculum Leaders – Cathy & Toby
Pedagogy: Provide focused needs based lessons that pre-load the identified students with the knowledge and strategy.	Ensure programme taught by Learning Space teacher reflects content/context of Focus group teaching. Classroom teachers allow specific teaching time for focus learner groups teaching.	Students as above.  Marama, Turama, and Ramaroa Nui Teachers.  All staff
Institution: Ensure there is a consistent approach with the staff involved.	Time allocated to Mathematics in staff meetings. Staff share back on focus learner groups and strategies being used. RBL observations of focus learner groups.	Students as above.  Marama, Turama and Ramaroa Nui Teachers.  All Staff
Leadership: Shared leadership approach. Classroom teachers having responsibility for focus learners within their space.	In collaborative spaces – one teacher take responsibility to implement ALiM approach.	Supported by Principal.  Curriculum Leaders – Cathy and Toby



## STUDENT ACHIEVEMENT ANNUAL TARGETS:

### 2020 Annual Plan

	Teacher may choose to share this responsibility term by term etc. Therefore, power sharing and distribution of leadership occurs.	
Spread: Ultimately across all underachieving Focus Learners	Implemented across whole school – becoming part of what we do and how we do it.	Classroom teachers to take responsibility for their focus learners.
Evidence: Accelerated Progress  Growth in student confidence	Ongoing sharing of individual student progress, celebrated with student and parents. (E-Tap real-time reporting)  Visual tracking of progress Student voice.	Teachers – regularly  Principal/BOT 1 x per term
Ownership	Develop a strategy / programme to ensure this approach can be sustained.	Lead Teachers Principal

#### Mathematics Data

This data is a snapshot at the end of Week 6, just prior to Lockdown and Week 2 Term 4

#### Term 1 Maths OTJ 2020

	Result	Num pupils	Boys	Girls	Boys%	
	Learning towards	13	5	8	8.1%	
	Learning at	69	32	37	51.6%	
	Learning beyond	38	25	13	40.3%	

**Total Learning AT or BEYOND 88%**

## STUDENT ACHIEVEMENT ANNUAL TARGETS: 2020 Annual Plan

### Term 3 Maths OTJ 2020

Result	Num pupils	Boys	Girls	Boys%	Girls%
Learning towards	21	8	13	11.8%	20.0%
Learning at	77	34	43	50.0%	66.2%
Learning beyond	35	26	9	38.2%	13.8%

**Total Learning AT or BEYOND 80%**

#### **Comment:**

**Term One:** Mathematics achievement sees with 86% achieving at a level or above expectation. This is up from 85% at this time in 2019. We have not been able to sustain the 92% level of achievement as at Term 3 2019 however. Mathematics has been an area of focus for the past 14 months and it is pleasing to see the improvement in our achievement.

In writing it is the movement of Boys from 'At' to 'Beyond' that could be a focus, in Mathematics it is the same but the movement of Girls.

This Data is based largely, if not solely, on number knowledge and strategy as this is generally the focus of Term One programmes.

One girl, achieving here at 'Towards', is now assessed as achieving 'At'

Two of the students "Working Towards" are Maori.

**Term Four:** The overall achievement of 80% is quite a concern. This is at a level never been experienced before which has lead us to consider the impact of COVID. This along with the enrolment of a number of new students across the school assessed as underachieving as well as other impacts on student well-being not as evident in the past is reflected in our results. Now that staff have had an opportunity to further discuss the individuals identified and share the specific programmes in place to support these students it is believed we can lift achievement for these students.

At the end of Term 4 we now have 84% of our students achieving At or Beyond expectation. The focussed support teachers are providing and the pre-teaching approach is having a positive effect. The successful application for URF funding to support this students into Term One 2021 will continue to have a positive impact.

## Timeline for Reporting on Annual Objectives and Reviewing the Charter

WORK ON ANNUAL OBJECTIVES	DATA GATHERING AND REVIEW OF CHARTER	SUBMIT REVIEWED CHARTER TO THE MOE	COMPILATION OF REPORT	PRESENTATION TO BOT AND COMMUNITY	SEND REPORT TO MOE
Throughout the 2020 School Year	November 2020	1 March 2021	November 2020	December 2020	May 2021

## INDEPENDENT AUDITOR'S REPORT

### TO THE READERS OF UPPER MOUTERE SCHOOL'S FINANCIAL STATEMENTS FOR THE YEAR ENDED 31 DECEMBER 2020

The Auditor-General is the auditor of Upper Moutere School (the School). The Auditor-General has appointed me, Warren Johnstone, using the staff and resources of BDO Christchurch, 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 22, that comprise the statement of financial position as at 31 December 2020, 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 2020; 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 Public Sector Public Benefit Entity Standards Reduced Disclosure Regime as applicable to entities that qualify as tier 2.

Our audit was completed on 31 May 2021. 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.

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 Novopay 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 arises from the Public Audit Act 2001.

#### **Other information**

The Board is responsible for the other information. The other information comprises the information included on the Board of Trustees Listing, Kiwisport Report, and Analysis of Variance but does not include the financial statements, and our auditor's report thereon.

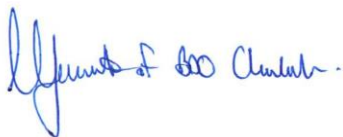
Our opinion on the financial statements does not cover the other information and we do not express any form of audit opinion or assurance conclusion thereon.

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.



Warren Johnstone  
BDO Christchurch  
On behalf of the Auditor-General  
Christchurch, New Zealand