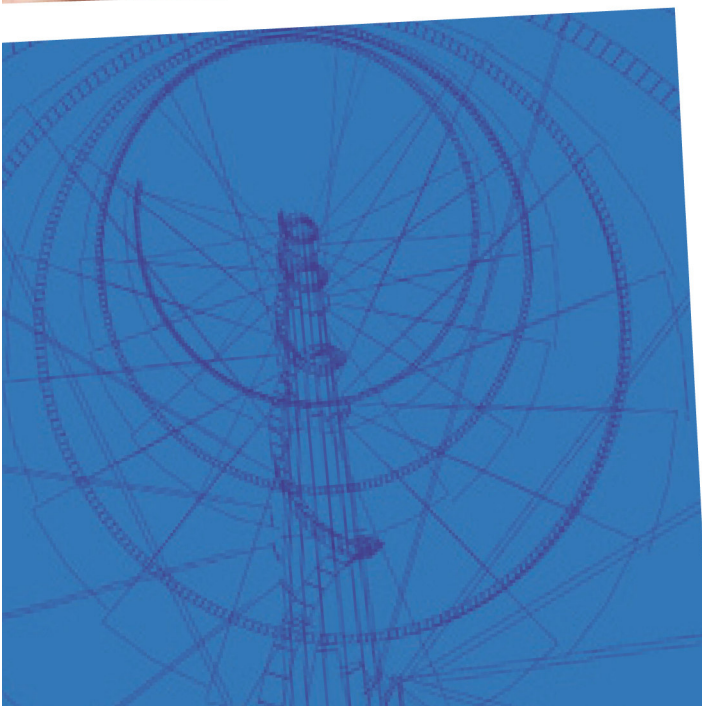


Guidelines for the 2009 Annual Report to the School Community



*Every
child,
every
opportunity*



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1. Executive summary

The Annual Report to the School Community (Annual Report) provides a means for the School Council, leadership team, staff and students to reflect on and communicate to the whole school community the successes of their improvement strategies, the effectiveness of resource allocation and their future directions.

The 2009 annual reporting process has been revised in response to the Department's strengthened approach to transparency and accountability in Victorian government schools. As indicated in the *Blueprint Implementation Paper: Supporting School Improvement: Transparency and Accountability in Victorian Government Schools*, this approach aims to strengthen the confidence of the school community by building on a strong base of transparency, openness and community engagement. The revised annual reporting process ensures high quality data is used and shared with the school community in order to monitor and drive school improvement.

The revised Annual Report will leverage off the successful implementation of the Victorian Government School Performance Summary (VGSPS) and the 'What Our School Is Doing' (WOSID) Statement. These will be used as key components in reporting to the school community.

The 2009 Annual Report will comprise:

- the WOSID statement which provides a concise summary of the school's context, its performance throughout the year in the three student outcome areas, and future directions
- the VGSPS which provides a record of the school's performance on a range of mandatory performance indicators
- a financial report reflecting on the financial performance and position of the school.

The Annual Report must be endorsed by School Council before it is submitted to the Regional Network Leader by 31 March.

The school is required to hold a public meeting to present the Annual Report to the school community.

2. Introduction

The School Accountability and Improvement Framework is constructed around four main elements:

- evaluation of progress via an internal School Self-Evaluation and an external school reviewer

- planning for improvement via a School Strategic Plan and Annual Implementation Plans
- reporting on progress via an Annual Report
- managing risk and compliance with legislation, regulation and policy via the School Compliance Checklist.

These elements are not discrete and independent but rather, in keeping with the intent and principles of good governance, are part of a coherent planning and reporting process for organising school improvement efforts.

These guidelines outline the process for preparing the Annual Report to the school community.

3. Overview of annual reporting

Annual reporting is an important tool for effective governance within schools and the government school system. Reporting to the school community adds value in a number of ways:

• Keeping the school community informed

Schools are important to their local communities. Parents and families, students and school staff make considerable contributions to their school. The Annual Report provides a means of informing the school community of what has been achieved and how the school is performing. Providing information about schools helps the community hold schools, the system and Government accountable for improving student outcomes.

• Contributing to system accountability and meeting legislative requirements

Schools are part of the publicly funded government education system. The information contained in the Annual Report helps the Department account to government and parliament for the use of these funds. Public accountability for improving student outcomes and for the use of public money is mandated in the *Education and Training Reform Act (2006)*, where School Councils are required to prepare and publish Annual Reports.

• Relationship between the planning and annual reporting processes

Schools need to analyse and reflect on achievements made during the past year to understand the impact of the strategies and programs that were undertaken, and to identify where progress has exceeded expectations, met expectations or was less than anticipated. The Annual Report is a means to describe this process and to inform future plans and directions. Where progress is greater or less than anticipated, it may be necessary to adjust the

The content of the Annual Report:

- School performance outcomes are presented across the three student outcome areas. Discussing both positive and negative aspects of the school's progress, the Annual Report provides the community with a balanced and realistic picture of overall progress towards the school's goals and targets.

- The Annual Report identifies the school's future directions to support school improvement.

- The Annual Report is written in plain English, so it is clear and easy to understand.

- The Annual Report is presented to the school community in a professional manner reflecting the values and principles of the school and Department.

The approach to the 2009 Annual Report will simplify and streamline the reporting process for schools, effectively reducing the workload of Principals and School Councils and avoiding duplication with other reporting requirements.

Both the structure of the 2009 Annual Report and the process for its development and publication have changed.

Schools are familiar with the Victorian Government School Performance Summary (VGSPS), published in November 2009. The VGSPS provides absolute scores for key performance indicators and intake-adjusted measures to indicate how the school's performance compares with other Victorian schools.

Also in late 2009, schools prepared the 'What our school is doing' (WOSID) statement that provided a summary of the school's context, a commentary on school performance across the three student outcome areas, and an indication of future directions for the school.

The new 2009 Annual Report builds on the successful implementation of both the VGSPS and the WOSID statement. These documents will be key components of the 2009 Annual Report and will be used to report on school performance.

The VGSPS will replace the Core Performance Indicators Report, previously used by schools in developing their Annual Reports.

Schools that wish to convey in greater detail their performance and achievements to their school community can do so through the School Council's public meeting to present the Annual Report, the school newsletter or annual school magazine.

Changes to the annual reporting process are outlined in Section 6: Key steps to completing Annual Reports.

The Annual Report structure has been simplified and will be comprised of the following components:

- Cover page
- 'What Our School Is Doing' statement
- School Performance Summary
- Financial Performance and Position statement.

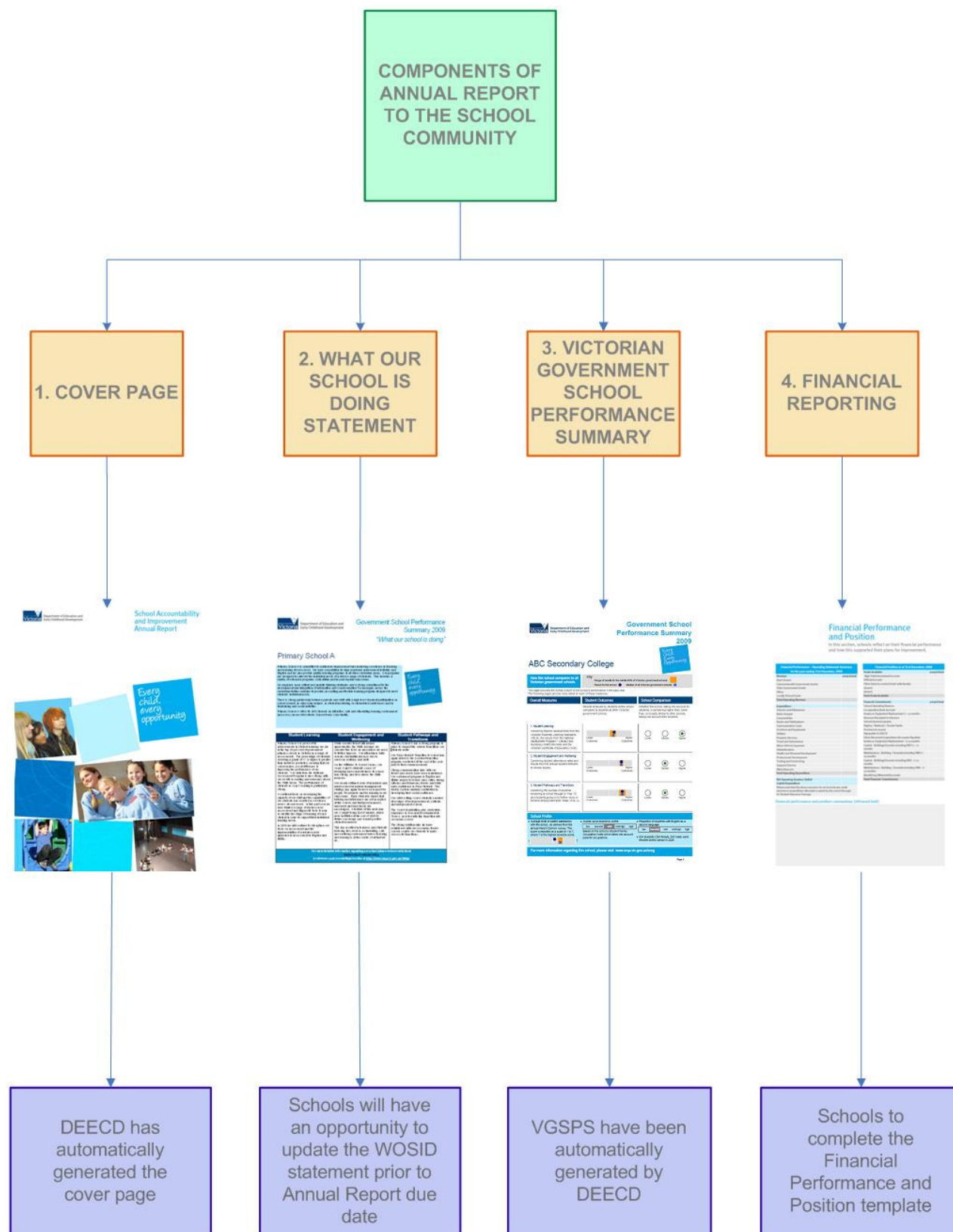
Figure 1 outlines the components of the revised Annual Report structure. These components are described in greater detail below.

The cover page for the new Annual Report will be automatically generated by the Department. The style is consistent with the Departmental corporate branding. School logos or images will no longer be included on the cover page. The cover page is available at:

<http://www.education.vic.gov.au/management/schoolimprovement/performance/data/performance/s.htm>

The WOSID statement is prepared by the school and provides succinct contextual information on the school and a brief discussion on the school's performance and future directions. This section of the report enables the school to make connections between performance outcomes over the past year and how these translate into plans for improvement in the coming 12 months.

Figure 1: Components of Annual Report



Schools will be required to update their WOSID in relation to:

- changes in the performance information in the VGSPS. The only change for 2009 is the addition of the 2009 VCE data. Schools with VCE students may need to comment on this data in their WOSID.
- the requirements of the *National Education Agreement*, as follows:
 - Workforce composition
 - Students participating in the Program for Students with a Disability (where there are more than 10 students in the program)
 - How non-attendance is being addressed by the school.
- the requirements of the National Partnerships funding agreement, for participating schools.

Appendix 1 provides advice about what schools need to do in addressing the mandatory reporting requirements related to the WOSID.

ACTIONS

Schools review and update their WOSID statements.

Checklist

The following criteria should be considered when finalising this section of the report:

- ☒ The WOSID provides succinct contextual information on the school.
- ☒ The WOSID presents a summary analysis of the school's performance and future directions, covering both positive and negative aspects.
- ☒ The school has updated the WOSID to include Commonwealth and State mandatory requirements, and to reflect updates in the VGSPS if required.
- ☒ Statements included in the WOSID are couched in a professional manner, reflecting the values and principles of the school and Department.
- ☒ The updated WOSID statement is available at: <http://www.education.vic.gov.au/management/schoolimprovement/performance/performance-reports.htm>

Victorian Government School Performance Summary

The VGSPS replaces the Core Performance Indicators Report which was previously used to assist schools in developing their Annual Reports. The VGSPS includes:

- absolute scores for key performance indicators for the year and across four years (where data are available) for the three student outcome areas
- intake adjusted school performance measures, which indicate how the school's performance compares with other Victorian government schools, taking into account the characteristics of the school and its students.

Each school's VGSPS has been updated to include:

- 2009 VCE data
- Additional information to address the requirements of the *National Education Agreement* as follows:
 - Percentage of students in Year 12 undertaking vocational or trade training
 - Percentage of students attaining a year 12 certificate or equivalent VET qualification
 - Teacher standards and qualifications
 - Data related to teacher satisfaction.

Appendix 1 outlines information in the VGSPS provided by the Department to meet the mandatory reporting requirements.

ACTIONS

Schools review the updated version of their VGSPS at:

<http://www.education.vic.gov.au/management/schoolimprovement/performance/performance-reports.htm>

More information on the VGSPS is available at:

<http://www.education.vic.gov.au/aboutschool/school-reports/default.htm>

Financial Performance and Position Statement

As part of the publicly funded education system, and mandated through the *Financial Management Act (1994)* and the *Education and Training Reform Act (2006)*, schools are accountable to the public and government for the efficient and effective use of those funds. The Annual Report must include:

- a summary of the School Council's financial performance (revenue/expenditure) for the school year
- a summary of the School Council's position for the school year (funds available/financial commitments).

This summary is required to be consistent with the school's Operating Statement, Balance Sheet and

Financial Commitments Summary, as certified by the Principal and School Council President at 31 December 2009. Certification of these statements by the Principal and School Council President is compulsory at year end as part of the school audit framework. Please note that Total Financial Commitments of the school should equal the Total Funds Available.

School Resource Package (SRP) funding and expenditure for centrally paid salaries are not included in this summary.

Appendix B provides advice on how schools can access financial information needed to complete this section through CASES21 Finance.

A commentary relating to the school's financial performance is also required as part of the Annual Report. This commentary has a limit of 300 words and should include the following:

- an outline of the reasons why the annual result was a surplus or deficit
- an explanation of any extraordinary revenue or expenditure items
- any new sources of funding the school received during the year; for example, special grants or fundraising initiatives
- any additional funding the school received (State/Commonwealth) beyond the School Resource Package, including the purpose of that funding and its link to improvements to teaching and learning e.g. National Partnerships funding.

Please note that a school's financial commitments will include both its legal obligations to pay creditors (Accounts Payable) as well as commitments the School Council has made in relation to future projects or programs.

The Financial Performance and Position template is available at:

<http://www.education.vic.gov.au/management/schoolimprovement/performance/performance.htm>

ACTIONS

Schools complete financial summaries templates.

Checklist

The following criteria should be considered when writing this section of the report:

- ☒ The report provides a summary of School Council's financial performance (revenue/expenditure) for the school year — Operating Statement Summary
- ☒ The report provides a summary of the School Council's financial position (funds available/financial commitments) for the school year — Financial Commitment Summary
- ☒ The financial report is consistent with the audited financial statements of the school
- ☒ The Total Financial Commitments of the school should equal the Total Funds Available — Financial Commitment Summary
- ☒ If applicable, the statement includes information about funding and activity related to National Partnerships.

The Financial Performance and Position template is available at:

<http://www.education.vic.gov.au/management/schoolimprovement/performance/performance.htm>

6. Key steps to completing Annual Reports

Date	Activity
9 Feb	Schools download the cover page, WOSID statement and Financial Performance and Position statement template, available on the School Performance Reports website http://www.education.vic.gov.au/management/schoolimprovement/performanceandpositionstatement/performanceandpositionstatement.htm . Schools commence preparation of the Financial Performance and Position statement.
17 Feb	Schools download the updated VGSPS at http://www.education.vic.gov.au/management/schoolimprovement/performanceandpositionstatement/performanceandpositionstatement.htm .
Feb-March	Schools update the WOSID and complete the Financial Performance and Position statement template and gain School Council endorsement of the Annual Report.
31 March	Schools submit the updated WOSID and completed Financial Performance and Position statement template to the region.
23 April	Regions review schools' documents and forward to the Department.
April	Department merges the Annual Report cover, the WOSID statement, the VGSPS document and Financial Summary document to form a single electronic document available at: http://www.education.vic.gov.au/management/schoolimprovement/performanceandpositionstatement/performanceandpositionstatement.htm .
Early May	Annual Reports available to schools at the School Performance Reports website http://www.education.vic.gov.au/management/schoolimprovement/performanceandpositionstatement/performanceandpositionstatement.htm .
School to decide date	School Council holds a public meeting to present the Annual Report.
Early June	Annual Reports published on the VRQA State Register.

Please Note: The components that are to be completed by schools have been uploaded to the School Performance Reports website with correct file naming conventions, as follows:

- WOSID statement:
School Number_WOSID
- Financial Summary:
School Number_FinSummary

Schools should ensure that the correct file names for these components are maintained.

7. Endorsement

School governance arrangements require the Annual Report be tabled at a School Council meeting for ratification and endorsement.

It is the responsibility of the school and School Council to ensure that the WOSID statement and financial summaries are accurate and meet the expectations identified within the guidelines.

8. Communication

An important part of engaging the school community in the annual reporting process is ensuring that the Annual Report is made available to every member of the school community.

Each year, School Councils are required under legislation to conduct a public meeting. The school's Annual Report is presented by the School Council at this meeting.

Under the Commonwealth's *National Education Agreement*, the Annual Report is required to be published on the internet. In order to ensure Victoria's compliance with these regulations, the VRQA State Register provides a means for all government schools to provide their Annual Report online to parents.

Schools are required to provide parents with the Annual report either online or via a means they can access.

9. Which schools should submit an Annual Report?

All schools are required to complete the Annual Report each year. This includes schools in their year of School Self-Evaluation, Review and Planning.

However, the following variations apply for the 2009 Annual Report:

Schools will not be required to produce an Annual Report until they have been open for a full year.

Closed schools

Schools that closed in 2009 are not required to prepare a 2009 Annual Report.

New or newly merged and de-merged schools

New schools formed in 2010, including those formed as a result of either a merge or de-merge, are not required to complete a 2009 Annual Report. This is regardless of whether or not the school number changes.

The previous entities that formed part of merged or de-merged schools are considered as closed and do not have to provide a 2009 Annual Report.

As new schools formed during 2009 have not been operating for a full year, they are not required to complete a 2009 Annual Report.

Hub/Annex schools

One Annual Report will be developed to reflect the performance of both hub and annex schools. An individual VGSPS is automatically generated for both hub and annex schools. It is expected that separate WOSID statements and financial performance and position templates will be completed for hub and annex schools and submitted to regions. These will be collated into one document by the Department.

10. Summary of roles in school annual reporting

How is the School Council involved in school annual reporting?

The School Council is an integral part of the governance structure of the school and its role includes:

- monitoring progress of the development of the Annual Report
- providing feedback to the leadership team on draft versions of the Annual Report
- endorsing the Annual Report
- holding a public meeting and inviting the school community to discuss the content of the Annual Report.

How are the school Principal and the school leadership team involved in annual reporting?

The school Principal plays a central role in annual reporting, both in the role of Principal and as executive officer of the School Council. The Principal, supported by the school leadership team, is responsible for:

- keeping the school community, including staff, students, council and parents, informed of school performance and future directions
- development of the Annual Report for consideration by the School Council
- ensuring the school community is provided with access to the Annual Report
- organising a public reporting meeting to communicate the Annual Report to the school community.

How are the regions involved in annual reporting?

Regional Network Leaders are accountable for the performance of schools within their networks and oversee a range of school support services. Regional Network Leaders and regional office personnel are responsible for:

- providing training, support and advice to schools in the annual reporting process
- quality assuring the WOSID statements and financial summaries prior to forwarding them to the Department
- helping schools to ensure that Annual Reports are consistent with the School Accountability and Improvement Framework guidelines and Departmental policy.

What is the role of the Department's central office?

The School Improvement Division is responsible for:

- developing the Department's policy framework for annual reporting, including guidelines and templates to be completed by schools
- electronically merging the four components of the Annual Report
- providing the Annual Reports to the VRQA to be published online on the State Register.

How are parents involved in annual reporting?

Parents are a key part of the school community and should:

- attend the public reporting meeting to discuss the Annual Report..

11. Further support and information

Overview of the Accountability and Improvement Framework for Victorian Government Schools

www.education.vic.gov.au/management/schoolimprovement/accountability/default.htm

School performance reports

www.education.vic.gov.au/management/schoolimprovement/performance/performance-reports.htm

Regional Network Leaders and regional accountability and improvement personnel can provide further assistance to schools. A list of regional accountability and improvement personnel is located at:

www.education.vic.gov.au/management/schoolimprovement/accountability/default.htm.

To contact the School Improvement Division regarding the School Accountability and Improvement Framework, please email: schoolaccountability@edumail.vic.gov.au

Appendix A: Required information to be included in the Annual Report 2009

1. What schools need to include in the WOSID and Financial Performance and Position statements

Additional Requirement	Approach to meeting the requirements	Example comments for schools to insert
Workforce composition	School to include information about workforce composition in the WOSID statement.	E.g: "This school has # equivalent full time staff: # Principal class, # teachers and # Education Support staff."
VCE outcomes data for 2009	2009 VCE outcomes data is included in the VGSPS . Schools with VCE students are able to update their WOSID statement to include commentary around VCE performance.	
Programs for Students with Disabilities (for schools with over 10 PSD students)	Applicable schools to include a commentary in the WOSID statement as part of discussion in the Student Learning outcomes section.	E.g: "All Program for Students with a Disability (PSD) students showed progress at satisfactory or above in achieving their individual goals."
Reporting on how non-attendance is being addressed by the school	Schools to include in the WOSID statement as part of discussion in the Student Engagement and Wellbeing outcomes section.	
National Partnerships funding and activity	Schools to include a high-level comment in the WOSID statement.	E.g: "National Partnerships funding has been used to build teacher capacity in Literacy and Numeracy interventions"
	Schools to include further detail on the use of their funding in the commentary section of the Financial Performance and Position Statement .	E.g: "National Partnership funding of [amount], supplemented by the school's contribution of [amount], was used to fund [school/staff/leadership team] participation in [initiative]."

2. Information required in the VGSPS

a) Information included in the VGSPS in November 2009

Overall socio-economic profile
Proportion of students with English as a second language
Parent satisfaction data
Student Learning: <ul style="list-style-type: none"> Teacher assessments from the Victorian Essential Learning Standards NAPLAN Years 3, 5, 7 and 9
Student Engagement and Wellbeing: <ul style="list-style-type: none"> Student attendance Student Attitudes to School data

Student Pathways and Transitions:

- Student retention
- Students exiting to further studies and full-time employment

b) Additional information provided by the Department in the updated VGSPS

Required information	Notes
Average student attendance rates for each year level	Included in the VGSPS in the Student Engagement and Wellbeing outcomes section.
Teacher satisfaction	To reduce the administrative burden on schools and to maintain existing trend data, the Department will be using the <i>School Morale</i> measure collected in Victorian government schools as a proxy measure for teacher satisfaction. This will be reported graphically in the VGSPS in a similar manner to Parent Satisfaction.
Teacher Standards Qualifications	As with previous Annual Reports, a statement is included in the VGSPS directing readers to the VIT website.
Percentage of students in Year 12 undertaking vocational or trade training	Data is included in the VGSPS , in the Student Learning outcomes section.
Percentage of students attaining a Year 12 certificate or equivalent VET qualification.	Data is included in the VGSPS , in the Student Pathways and Transitions outcomes section.

Appendix B: Working with CASES21 finance reports

Financial Performance

Schools should use their Operating Statement — Detailed (GL21150) as the basis for the Financial Performance component of their Annual Report. Schools should ensure that all relevant family charges have been written off, or adjusted via balance day adjustment journal, prior to end of year.

For more information on the CASES21 Finance Operating Statement schools should refer to *The Guide to the C21F Operating Statement* that can be found on the School Financial Management website:
www.education.vic.gov.au/management/financial.

For more information on processing balance day adjustments and write-offs in C21F, schools should refer to the C21F Process Guide — Section 11 End of Year Procedures.

Financial Position

In developing the Summary of Financial Position component of their Annual Report schools should use their CASES21 Finance Balance Sheet (GL21160S) and the Financial Commitment Summary for the Year Ended 31 December 2009 (GLBANK21002).

It should be noted that the descriptions provided in the financial commitments section of the table replicate some of the descriptions in GLBANK21002. Schools may change these descriptions to suit their reporting requirements as required so long as the total commitments reported remains equal to the total funds available amount.

For more information on the CASES21 Finance Balance Sheet schools should refer to *The Guide to the C21F Balance Sheet* that can be found on the School Financial Management website:
www.education.vic.gov.au/management/financial.

For more information on the Financial Commitments Summary schools should refer to Circular 437-2008, Financial Commitment Summary:
www.eduweb.vic.gov.au/edulibrary/public/schadmin/Management/Finance/School_Circular_Ss460-2007_financialcommitment-clr.doc.

For more information on School Operating Reserves schools should refer to Circular 436-2008, New School Cash Reserves Benchmarks:
www.eduweb.vic.gov.au/edulibrary/public/schadmin/Management/Finance/School_Circular_s461-2007_cashresbenchmark-clr.doc.