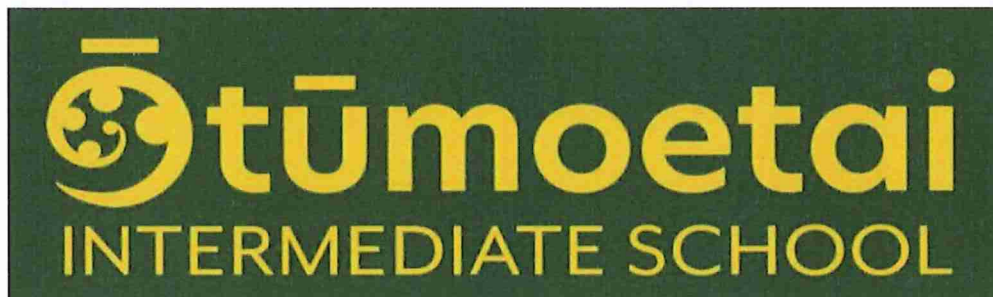


OTUMOETAI INTERMEDIATE SCHOOL

ANNUAL REPORT

FOR THE YEAR ENDED 31 DECEMBER 2022



Ministry Number:	1878
Principal:	Henk Popping
School Address:	5 Charles Street, Otumoetai, Tauranga, 3110
School Postal Address:	5 Charles Street, Otumoetai, Tauranga, 3110
School Phone:	07 576 5105
School Email:	admin@otuinterschool.nz
Accounting/Service Provider:	Accounting For Schools Limited

OTUMOETAI INTERMEDIATE SCHOOL

Annual Report – For the year ended 31 December 2022

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OTUMOETAI INTERMEDIATE SCHOOL

Statement of Responsibility

For the year ended 31 December 2022

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

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

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

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

Tony Scott

Full Name of Presiding Member

[Signature]

Signature of Presiding Member

Date:

25 May 2023

Hendrick Popping

Full Name of Principal

[Signature]

Signature of Principal

Date:

25 May 2023.

OTUMOETAI INTERMEDIATE SCHOOL
Statement of Comprehensive Revenue and Expense
For the year ended 31 December 2022

	Notes	2022 Actual \$	2022 Budget (Unaudited) \$	2021 Actual \$
Revenue				
Government Grants	2	7,612,453	6,764,439	6,842,608
Locally Raised Funds	3	386,392	123,372	528,259
Interest Earned		10,148	5,570	6,549
Gain on Sale of Property, Plant and Equipment		293	-	-
		8,009,286	6,893,381	7,377,416
Expenses				
Locally Raised Funds	3	243,616	48,678	332,286
Learning Resources	4	5,934,951	5,185,054	5,519,242
Administration	5	239,168	275,648	224,826
Finance		5,136	-	9,307
Property	6	1,374,051	1,397,961	1,463,385
Loss on Disposal of Property, Plant and Equipment		54	-	7,973
		7,796,976	6,907,341	7,557,019
Net Surplus / (Deficit) for the year		212,310	(13,960)	(179,603)
Other Comprehensive Revenue and Expenses		-	-	-
Total Comprehensive Revenue and Expense for the Year		212,310	(13,960)	(179,603)

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

OTUMOETAI INTERMEDIATE SCHOOL

Statement of Changes in Net Assets/Equity

For the year ended 31 December 2022

	2022 Actual \$	2022 Budget (Unaudited) \$	2021 Actual \$
Balance at 1 January	<u>1,505,807</u>	<u>1,505,807</u>	<u>1,685,410</u>
Total comprehensive revenue and expense for the year	212,310	(13,960)	(179,603)
Capital Contributions from the Ministry of Education Contribution - Furniture and Equipment Grant	52,573	-	-
Capital Contributions to the Ministry of Education	(78,295)	-	-
Equity at 31 December	<u>1,692,395</u>	<u>1,491,847</u>	<u>1,505,807</u>
Accumulated comprehensive revenue and expense	1,692,395	1,491,847	1,505,807
Equity at 31 December	<u>1,692,395</u>	<u>1,491,847</u>	<u>1,505,807</u>

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.

OTUMOETAI INTERMEDIATE SCHOOL

Statement of Financial Position

As at 31 December 2022

	Notes	2022 Actual \$	2022 Budget (Unaudited) \$	2021 Actual \$
Current Assets				
Cash and Cash Equivalents	7	1,134,576	1,050,747	1,835,751
Accounts Receivable	8	412,856	410,000	445,341
Funds owed for Capital Works Projects	19	90,407	-	25,424
GST Receivable		54,479	30,000	8,029
Inventories	9	18,740	10,000	6,349
Investments	10	24,000	24,000	-
Prepayments		16,771	10,000	-
		<u>1,751,829</u>	<u>1,534,747</u>	<u>2,320,894</u>
Current Liabilities				
Accounts Payable	12	478,662	472,900	517,139
Finance Lease Liability - Current Portion	16	17,445	30,000	47,469
Funds held on behalf of Kaitiaki Governance Group	17	245,578	300,000	371,587
Funds held on behalf of Tauranga Transport Network	18	156,680	180,000	182,107
Funds held for Capital Works Projects	19	1,199	-	647,116
Painting Contract Liability - Current Portion	15	-	-	20,977
Provision for Cyclical Maintenance	14	49,731	60,000	81,562
Revenue Received in Advance	13	226,918	180,000	85,075
		<u>1,176,213</u>	<u>1,222,900</u>	<u>1,953,032</u>
Working Capital Surplus		575,616	311,847	367,862
Non-current Assets				
Property, Plant and Equipment	11	1,266,049	1,350,000	1,366,095
		<u>1,266,049</u>	<u>1,350,000</u>	<u>1,366,095</u>
Non-current Liabilities				
Finance Lease Liability	16	16,126	20,000	24,859
Provision for Cyclical Maintenance	14	133,144	150,000	203,291
		<u>149,270</u>	<u>170,000</u>	<u>228,150</u>
Net Assets		<u>1,692,395</u>	<u>1,491,847</u>	<u>1,505,807</u>
Equity		<u>1,692,395</u>	<u>1,491,847</u>	<u>1,505,807</u>

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

OTUMOETAI INTERMEDIATE SCHOOL

Statement of Cash Flows

For the year ended 31 December 2022

	Note	2022 Actual \$	2022 Budget (Unaudited) \$	2021 Actual \$
Cash flows from Operating Activities				
Government Grants		2,126,819	1,496,048	1,676,735
Locally Raised Funds		341,034	113,010	187,956
International Students		286,236	192,163	74,657
Goods and Services Tax (net)		(46,567)	(21,966)	(22,362)
Funds Administered on Behalf of Third Parties		(151,436)	(73,694)	512,402
Payments to Employees		(1,231,901)	(788,791)	(1,007,621)
Payments to Suppliers		(981,977)	(834,442)	(964,142)
Interest Paid		(5,136)	-	(9,307)
Interest Received		10,131	5,570	6,549
Net cash from / (to) the Operating Activities		347,203	87,898	454,867
Cash flows from Investing Activities				
Purchase of PPE (and Intangibles)		(218,962)	(143,905)	(191,519)
Proceeds from Sale of Investments		(24,000)	(24,000)	-
Net cash from / (to) the Investing Activities		(242,962)	(167,905)	(191,519)
Cash flows from Financing Activities				
Furniture and Equipment Grant		52,573	-	-
Finance Lease Payments		(47,817)	(62,328)	(45,362)
Painting contract payments		(20,977)	(20,977)	(26,118)
Funds Held for Capital Works Projects		(789,195)	(621,692)	177,093
Net cash from Financing Activities		(805,416)	(704,997)	105,613
Net increase/(decrease) in cash and cash equivalents		(701,175)	(785,004)	368,961
Cash and cash equivalents at the beginning of the year	7	1,835,751	1,835,751	1,466,790
Cash and cash equivalents at the end of the year	7	1,134,576	1,050,747	1,835,751

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.

OTUMOETAI INTERMEDIATE SCHOOL

For the year ended 31 December 2022

Notes to the Financial Statements

1. Statement of Accounting Policies

a) Reporting Entity

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

b) Basis of Preparation

Reporting Period

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

Basis of Preparation

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

Financial Reporting Standards Applied

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

PBE Accounting Standards Reduced Disclosure Regime

The School qualifies for Tier 2 as the school is not publicly accountable and is not considered large as it falls below the 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.

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.

OTUMOETAI INTERMEDIATE SCHOOL

For the year ended 31 December 2022

Notes to the Financial Statements

Useful lives of property, plant and equipment

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

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 14.

Critical Judgements in applying accounting policies

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

Classification of leases

Determining whether a lease is a finance lease or an operating lease requires judgement as to whether the lease transfers substantially all the risks and rewards of ownership to the school. A lease is classified as a finance lease if it transfers substantially all risks and rewards incidental to ownership of an underlying asset to the lessee. In contrast, an operating lease is a lease that does not transfer substantially all the risks and rewards incidental to ownership of an asset to the lessee. Judgement is required on various aspects that include, but are not limited to, the fair value of the leased asset, the economic life of the leased asset, whether or not to include renewal options in the lease term, and determining an appropriate discount rate to calculate the present value of the minimum lease payments. Classification as a finance lease means the asset is recognised in the statement of financial position as property, plant, and equipment, whereas for an operating lease no such asset is recognised. Finance lease liability disclosures are contained in note 16. Future operating lease commitments are disclosed in note 24b.

Recognition of grants

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

c) Revenue Recognition

Government Grants

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

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

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

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

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

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

OTUMOETAI INTERMEDIATE SCHOOL

For the year ended 31 December 2022

Notes to the Financial Statements

Other Grants where conditions exist

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

Donations, Gifts and Bequests

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

Interest Revenue

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

d) Operating Lease Payments

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

e) Finance Lease Payments

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

f) Cash and Cash Equivalents

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

g) Accounts Receivable

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

h) Inventories

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

i) Investments

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

j) Property, Plant and Equipment

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

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

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

OTUMOETAI INTERMEDIATE SCHOOL

For the year ended 31 December 2022

Notes to the Financial Statements

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

Finance Leases

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

Depreciation

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

The estimated useful lives of the assets are:

Building improvements	10–75 years
Board Owned Buildings	10–75 years
Furniture and Equipment	5 - 15 years
Information and Communication Technology	3 - 5 years
Leased Assets held under a Finance Lease	Term of Lease
Library Resources	12.5% Diminishing value
Motor Vehicles	5 years
Textbooks	4 years

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

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

Non cash generating assets

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

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

In determining fair value less costs to sell the school engages an independent valuer to assess market value based on the best available information.

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

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

OTUMOETAI INTERMEDIATE SCHOOL

For the year ended 31 December 2022

Notes to the Financial Statements

l) 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.

m) Employee Entitlements

Short-term employee entitlements

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

Long-term employee entitlements

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

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

n) Revenue Received in Advance

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

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

o) Funds Held in Trust

Funds are held in trust where they have been received by the School for a specified purpose, or are being held on behalf of a third party and these transactions are not recorded in the Statement of Revenue and Expense. The School holds sufficient funds to enable the funds to be used for their intended purpose at any time.

p) Funds held for Capital works

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

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

q) Shared Funds

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

OTUMOETAI INTERMEDIATE SCHOOL

For the year ended 31 December 2022

Notes to the Financial Statements

r) Provision for Cyclical Maintenance

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

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

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

s) Financial Instruments

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

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

t) 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.

u) Budget Figures

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

v) 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.

OTUMOETAI INTERMEDIATE SCHOOL

For the year ended 31 December 2022

Notes to the Financial Statements

2. Government Grants

	2022	2022	2021
	Actual	Budget	Actual
	\$	(Unaudited)	\$
Government Grants - Ministry of Education	2,145,210	1,514,439	1,676,735
Teachers' Salaries Grants	4,475,058	4,300,000	4,261,859
Use of Land and Buildings Grants	992,185	950,000	904,014
	<u>7,612,453</u>	<u>6,764,439</u>	<u>6,842,608</u>

The School has opted in to the donations scheme for this year. Total amount received was \$135,000 (2021: \$136,833).

3. Locally Raised Funds

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

	2022	2022	2021
	Actual	Budget	Actual
	\$	(Unaudited)	\$
Revenue			
Donations & Bequests	28,964	20,000	35,893
Fees for Extra Curricular Activities	167,231	-	110,464
Fundraising & Community Grants	5,617	-	4,524
Other revenue	49,178	51,372	83,848
Trading	38,247	2,000	34,964
International Student Fees	97,155	50,000	258,566
	<u>386,392</u>	<u>123,372</u>	<u>528,259</u>
Expenses			
Extra Curricular Activities Costs	162,107	18,000	121,580
Other Locally Raised Funds Expenditure	1,949	1,500	17,631
Trading	23,883	-	40,251
International Student - Employee Benefit - Salaries	23,150	25,178	80,082
International Student - Other Expenses	32,527	4,000	72,742
	<u>243,616</u>	<u>48,678</u>	<u>332,286</u>
<i>Surplus for the year Locally raised funds</i>	<u>142,776</u>	<u>74,694</u>	<u>195,973</u>

During the year the School hosted 8 International students (2021:20)

4. Learning Resources

	2022	2022	2021
	Actual	Budget	Actual
	\$	(Unaudited)	\$
Curricular	100,567	92,801	111,795
Equipment repairs	-	500	-
Employee Benefits - Salaries	5,489,529	4,869,053	4,988,815
Library Resources	2,841	2,200	2,718
Staff Development	13,705	20,500	78,995
Depreciation	328,309	200,000	336,919
	<u>5,934,951</u>	<u>5,185,054</u>	<u>5,519,242</u>

OTUMOETAI INTERMEDIATE SCHOOL

For the year ended 31 December 2022

Notes to the Financial Statements

5. Administration

	2022	2022	2021
	Actual	Budget	Actual
	\$	(Unaudited)	\$
		\$	
Audit Fee	8,098	7,828	7,828
Board of Trustees Fees	5,988	7,096	7,094
Board of Trustees Expenses	8,949	13,666	2,311
Communication	11,895	12,000	10,481
Consumables	34,151	35,100	40,767
Operating Lease	852	43,170	2,935
Other	61,308	59,150	52,167
Employee Benefits - Salaries	80,042	71,151	77,449
Insurance	22,945	21,237	18,996
Service Providers, Contractors and Consultancy	4,940	5,250	4,798
	<u>239,168</u>	<u>275,648</u>	<u>224,826</u>

6. Property

	2022	2022	2021
	Actual	Budget	Actual
	\$	(Unaudited)	\$
		\$	
Caretaking and Cleaning Consumables	17,852	14,600	15,045
Consultancy and Contract Services	98,595	95,850	91,102
Cyclical Maintenance Expense	(79,356)	41,380	189,517
Grounds	26,161	33,800	22,211
Heat, Light and Water	74,251	71,000	45,966
Rates	27,749	28,000	24,636
Repairs and Maintenance	62,230	27,500	31,209
Use of Land and Buildings	992,185	950,000	904,014
Security	22,577	12,500	15,975
Employee Benefits - Salaries	131,807	123,331	123,710
	<u>1,374,051</u>	<u>1,397,961</u>	<u>1,463,385</u>

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

OTUMOETAI INTERMEDIATE SCHOOL

For the year ended 31 December 2022

Notes to the Financial Statements

7. Cash and Cash Equivalents

	2022	2022	2021
	Actual	Budget	Actual
	\$	(Unaudited)	\$
		\$	
Cash on Hand	230	230	230
ASB Cheque Account	963,685	838,428	1,648,965
ASB On Call 51	89	89	89
ASB On Call 52	13,891	12,000	4,359
Tauranga Transport Network Funds	156,681	200,000	182,108
Cash equivalents for Cash Flow Statement	<u>1,134,576</u>	<u>1,050,747</u>	<u>1,835,751</u>

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

Of the 1,134,576 Cash and Cash Equivalents, \$156,681 (2021: \$182,108) is held by the School on behalf of the Tauranga Transport Network Group (see Note 18), \$245,578 (2021: \$371,587) is held by the School on behalf of the Kaitiaki Governance Group (see note 17) and \$1,199 is held by the School for Ministry Funded Projects.

8. Accounts Receivable

	2022	2022	2021
	Actual	Budget	Actual
	\$	(Unaudited)	\$
		\$	
Receivables	9,400	10,000	-
Receivables from the Ministry of Education	-	-	96,876
Interest Receivable	17	-	-
Teacher Salaries Grant Receivable	403,439	400,000	348,464
	<u>412,856</u>	<u>410,000</u>	<u>445,340</u>
Receivables from Exchange Transactions	9,417	-	96,876
Receivables from Non-Exchange Transactions	403,439	400,000	348,464
	<u>412,856</u>	<u>400,000</u>	<u>445,340</u>

9. Inventories

	2022	2022	2021
	Actual	Budget	Actual
	\$	(Unaudited)	\$
		\$	
Stationery	7,666	-	3,577
Uniforms	11,074	10,000	2,772
	<u>18,740</u>	<u>10,000</u>	<u>6,349</u>

10. Investments

The School's investment activities are classified as follows:

	2022	2022	2021
	Actual	Budget	Actual
	\$	(Unaudited)	\$
		\$	
Current Asset			
Short-term Bank Deposits	24,000	24,000	-

OTUMOETAI INTERMEDIATE SCHOOL

For the year ended 31 December 2022

Notes to the Financial Statements

11. Property, Plant and Equipment

	Opening Balance (NBV)	Additions	Disposals	Impairment	Depreciation	Total (NBV)
2022	\$	\$	\$	\$	\$	\$
Buildings	565,472	23,894	(8,505)	-	(37,112)	543,749
Furniture and Equipment	515,226	88,998	(54)	-	(123,908)	480,262
Information Technology	146,942	107,562	-	-	(105,631)	148,873
Leased Assets	66,322	9,060	-	-	(41,364)	34,018
Library Resources	25,528	3,986	-	-	(3,233)	26,281
Motor Vehicles	19,687	-	-	-	(7,200)	12,487
Textbooks	26,918	3,322	-	-	(9,861)	20,379
Balance at 31 December 2022	1,366,095	236,822	(8,559)	-	(328,309)	1,266,049

The net carrying value of equipment held under a finance lease is \$34,018 (2021: \$66,322).

Restrictions

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

	2022	2022	2022	2021	2021	2021
	Cost or Valuation	Accumulated Depreciation	Net Book Value	Cost or Valuation	Accumulated Depreciation	Net Book Value
2022	\$	\$	\$	\$	\$	\$
Buildings	793,430	(249,681)	543,749	778,335	(212,863)	565,472
Furniture and Equipment	1,829,132	(1,348,870)	480,262	1,749,554	(1,234,328)	515,226
Information Technology	749,014	(600,141)	148,873	761,256	(614,314)	146,942
Leased Assets	212,820	(178,802)	34,018	203,760	(137,438)	66,322
Library Resources	97,473	(71,192)	26,281	93,488	(67,960)	25,528
Motor Vehicles	66,193	(53,706)	12,487	66,193	(46,506)	19,687
Textbooks	172,096	(151,717)	20,379	168,774	(141,856)	26,918
Balance at 31 December 2022	3,920,158	(2,654,109)	1,266,049	3,821,360	(2,455,265)	1,366,095

OTUMOETAI INTERMEDIATE SCHOOL

For the year ended 31 December 2022

Notes to the Financial Statements

12. Accounts Payable

	2022 Actual \$	2022 Budget (Unaudited) \$	2021 Actual \$
Creditors	14,554	50,000	128,230
Accruals	8,063	7,500	6,578
Banking staffing overuse	-	-	18,391
Employee Entitlements - Salaries	440,694	400,000	348,464
Employee Entitlements - Leave Accrual	15,351	15,400	15,478
	<u>478,662</u>	<u>472,900</u>	<u>517,141</u>
Payables for Exchange Transactions	463,311	57,500	501,663
Payables for Non-exchange Transactions - Other	15,351	415,400	15,478
	<u>478,662</u>	<u>472,900</u>	<u>517,141</u>

The carrying value of payables approximates their fair value.

13. Revenue Received in Advance

	2022 Actual \$	2022 Budget (Unaudited) \$	2021 Actual \$
International Student Fees	226,918	180,000	37,837
Laptop Tech Fees in Advance	-	-	31,494
Stationery Income in Advance	-	-	15,744
	<u>226,918</u>	<u>180,000</u>	<u>85,075</u>

14. Provision for Cyclical Maintenance

	2022 Actual \$	2022 Budget (Unaudited) \$	2021 Actual \$
Provision at the Start of the Year	284,853	284,853	111,890
Increase/(decrease) to the Provision During the Year	(79,356)	85,362	172,963
Use of the Provision During the Year	(22,622)	(160,215)	-
Provision at the End of the Year	<u>182,875</u>	<u>210,000</u>	<u>284,853</u>
Cyclical Maintenance - Current	49,731	60,000	81,562
Cyclical Maintenance - Non Current	133,144	150,000	203,291
	<u>182,875</u>	<u>210,000</u>	<u>284,853</u>

The schools cyclical maintenance schedule details annual painting to be undertaken, the costs associated to this annual work will vary dependent on the requirements during the year. This plan is based on estimated costs and timing of painting.

OTUMOETAI INTERMEDIATE SCHOOL

For the year ended 31 December 2022

Notes to the Financial Statements

15. Painting Contract Liability

	2022 Actual \$	2022 Budget (Unaudited) \$	2021 Actual \$
Current Liability	-	-	20,977
Non Current Liability	-	-	-
	<u>-</u>	<u>-</u>	<u>20,977</u>

In December 2016 the Board signed an agreement with Programmed Property Services Ltd (the contractor) for an agreed programme of work covering an seven year period. The programme provides for an exterior repaint of the Ministry owned buildings in 2016, with regular maintenance in subsequent years. The agreement has an annual commitment of \$35,482. 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.

16. Finance Lease Liability

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

	2022 Actual \$	2022 Budget (Unaudited) \$	2021 Actual \$
No Later than One Year	18,322	30,000	52,519
Later than One Year and no Later than Five Years	16,302	20,000	26,946
Future Finance Charges	(1,053)	-	(7,138)
	<u>33,571</u>	<u>50,000</u>	<u>72,327</u>
Represented by			
Finance lease liability - Current	17,445	30,000	47,469
Finance lease liability - Non Current	16,126	20,000	24,859
	<u>33,571</u>	<u>50,000</u>	<u>72,328</u>

OTUMOETAI INTERMEDIATE SCHOOL

For the year ended 31 December 2022

Notes to the Financial Statements

17. Funds held on behalf of Te Tai Whanake ki Tauranga Moana - Kaitiaki Governance Group

Otumoetai Intermediate School is the fund holder for the Kaitiaki Governance Group, a group of three local iwi funded by the Ministry of Education and other funders to create an online portal for the teaching of Te Reo.

	2022	2022	2021
	Actual	Budget	Actual
	\$	(Unaudited) \$	\$
Funds Held at Beginning of the Year	371,587	300,000	-
Funding Received from Ministry of Education	93,840	-	252,720
Funding Received from Tauranga Energy Consumer Trust	300,930	-	388,956
Funding Received from Bay of Plenty Trust	75,000	-	75,000
Interest Received	372	-	31
Total Funds Available	841,729	300,000	716,707
Distribution of funding to Iwi	(596,151)	-	(345,120)
Funds Held at Year End	245,578	300,000	371,587

18. Funds held on behalf of Tauranga Transport Network

	2022	2022	2021
	Actual	Budget	Actual
	\$	(Unaudited) \$	\$
Funds Held at Beginning of the Year	182,108	180,000	41,293
Funds Received from Cluster Members	1,215,589	-	1,255,261
Other Income	77,897	-	89,767
Funds Spent on Behalf of Consumers	(1,218,093)	-	(1,204,213)
Funds Held at Year End	156,681	180,000	182,108

OTUMOETAI INTERMEDIATE SCHOOL

For the year ended 31 December 2022

Notes to the Financial Statements

19. 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. The amount of cash held on behalf of the Ministry for capital works project is included under cash and cash equivalents in note 7.

2022	Opening Balances \$	Receipts from MoE	Payments	BOT Contribution/ Adjustment	Closing Balances \$
Admin Area & Sick Bays Revamp	(10,650)	-	(10,100)	20,750	-
Air Conditioner Unit Replacements	(469)	47,000	(45,905)	-	626
Block A Rms 21-26 Refurb	582,394	90,000	(754,284)	78,295	(3,595)
Block P - Tile Replacement	(500)	-	-	-	(500)
Block T - Toilet Refurb	(2,983)	-	-	-	(2,983)
Boiler Decommission	47,312	-	(130,005)	-	(82,693)
Floor & Wall Coverings	16,837	-	(16,837)	-	-
LSC Office	573	-	-	-	573
Roofing Blocks	(2,900)	2,900	-	-	-
Tarseal Rear Car Park	(421)	4,584	(4,163)	-	-
Top Astro Turf Replacement	(4,093)	4,093	-	-	-
Tree Removals	(3,158)	2,522	-	-	(636)
Reconcrete Accessway	(250)	-	-	250	-
Totals	621,692	151,099	(961,294)	99,295	(89,208)

Represented by:

Funds Held on Behalf of the Ministry of Education	1,199
Funds Due from the Ministry of Education	(90,407)
	(89,208)

OTUMOETAI INTERMEDIATE SCHOOL

For the year ended 31 December 2022

Notes to the Financial Statements

19. Funds Held for Capital Works Projects (cont.)

2021	Opening Balances	Receipts from MoE	Payments	BOT Contribution/ (Write-off to R&M)	Closing Balances
	\$	\$	\$	\$	\$
Admin Area & Sick Bays Revamp	90,450	13,589	(114,689)	-	(10,650)
Air Conditioner Unit Replacements	(469)	-	-	-	(469)
Block A Rms 21-26 Refurb	53,058	756,859	(227,523)	-	582,394
Block P - Tile Replacement	(500)	-	-	-	(500)
Block T - Toilet Refurb	(2,983)	-	-	-	(2,983)
Boiler Decommission	259,029	84,330	(296,047)	-	47,312
Electrical Main Upgrade	(3,300)	-	-	3,300	-
Floor & Wall Coverings Blk, D, E, F, H, Q & S	46,140	-	(29,303)	-	16,837
Learning Support Coordinator Office	(5,832)	7,030	(625)	-	573
Roofing Blocks	(1,030)	-	(1,870)	-	(2,900)
Security System Replacement	2,377	-	(2,377)	-	-
Tarseal Rear Car Park	(3,594)	145,021	(141,848)	-	(421)
Top Astro Turf Replacement	14,661	2,911	(21,665)	-	(4,093)
Tree Removals	(3,158)	-	-	-	(3,158)
Reconcrete Accessway	(250)	-	-	-	(250)
Totals	444,599	1,009,740	(835,947)	3,300	621,692

Represented by:

Funds Held on Behalf of the Ministry of Education	647,116
Funds Due from the Ministry of Education	(25,424)
	<u>621,692</u>

20. 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.

OTUMOETAI INTERMEDIATE SCHOOL

For the year ended 31 December 2022

Notes to the Financial Statements

21. Remuneration

Key management personnel compensation

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

	2022 Actual \$	2021 Actual \$
<i>Board Members</i>		
Remuneration	5,988	7,094
<i>Leadership Team</i>		
Remuneration	651,601	632,815
Full-time equivalent members	5.00	4.00
Total key management personnel remuneration	657,589	639,909

There are six members of the Board excluding the Principal. The Board had held 9 full meetings of the Board in the year. The Board also has Finance (3 members) and Property (3 members) that meet monthly and quarterly respectively. As well as these regular meetings, including preparation time, the Presiding and other Board members have also been involved in ad hoc meetings to consider student welfare matters including stand downs, suspensions, and other disciplinary matters.

Principal

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

	2022 Actual \$000	2021 Actual \$000
Salaries and Other Short-term Employee Benefits:		
Salary and Other Payments	190 - 200	190 - 200

Other Employees

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

Remuneration \$000	2022 FTE Number	2021 FTE Number
100 - 110	6	6
110 - 120	3	3
120 - 130	1	0
130 - 140	1	1
	11	10

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

22. 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:

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

OTUMOETAI INTERMEDIATE SCHOOL

For the year ended 31 December 2022

Notes to the Financial Statements

23. Contingencies

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

Holidays Act Compliance – schools payroll

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

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

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

24. Commitments

(a) Capital Commitments

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

(i) \$935,952 contract for Block A Refurbishment. At balance date \$932,357 has been received from the Ministry of Education, with \$935,952 spent; and

(ii) \$454,732 contract for Boiler Decommission. At balance date \$376,803 has been received from the Ministry of Education, with \$459,496 spent; and

(iii) \$70,305 contract for Learning Support Coordinator Office. At balance date \$70,305 has been received from the Ministry of Education, with \$69,732 spent; and

(iv) \$25,220 contract for Tree Removals. At balance date \$22,698 has been received from the Ministry of Education, with \$23,334 spent.

(v) \$63,500 contract for Air Conditioner Unit Replacements. At balance date \$47,000 has been received from the Ministry of Education, with \$46,374 spent.

(vi) Contract for Block P - Tile Replacement. At balance date \$0 has been received from the Ministry of Education, with \$500 spent.

(vii) Contract for Block T - Toilet Refurbishment. At balance date \$0 has been received from the Ministry of Education, with \$2,983 spent.

(Capital commitments at 31 December 2021: \$2,325,070)

(b) Operating Commitments

As at 31 December 2022 the Board has entered into the following contracts:

(a) The School has entered into an new agreement on the 12th of December 2016, commencing 1 January 2017 with Programmed Maintenance Services Ltd for the painting of the Schools buildings. The amount committed on the contract is:

	2022 Actual \$	2021 Actual \$
No later than One Year	-	20,977
Later than One Year and No Later than Five Years	-	-
	<u>-</u>	<u>20,977</u>

OTUMOETAI INTERMEDIATE SCHOOL

For the year ended 31 December 2022

Notes to the Financial Statements

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	2022	2022	2021
	Actual	Budget (Unaudited)	Actual
	\$	\$	\$
Cash and Cash Equivalents	1,134,576	1,050,747	1,835,751
Receivables	412,856	410,000	445,340
Investments - Term Deposits	24,000	24,000	-
Total Financial assets measured at amortised cost	<u>1,571,432</u>	<u>1,484,747</u>	<u>2,281,091</u>
Financial liabilities measured at amortised cost			
Payables	478,662	472,900	517,141
Finance Leases	33,571	50,000	72,328
Painting Contract Liability	-	-	20,977
Total Financial Liabilities Measured at Amortised Cost	<u>512,233</u>	<u>522,900</u>	<u>610,446</u>

26. Events After Balance Date

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

27. Comparatives

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

OTUMOETAI INTERMEDIATE SCHOOL

Members of the Board

For the year ended 31 December 2022

Name	Position	How position on Board gained	Term expired / expires
Tony Scott	Presiding Member	Selected	Sept 2024
Henk Popping	Principal	Appointed	
Hughwyn Habib	Teacher Rep	Elected	Sept 2024
Tracy Hayson	Parent Rep	Selected	Sept 2024
Nicola Hawkes	Secretary	Elected	Dec 2023
Andrew Chappell	Parent Rep Treasurer	Elected	Dec 2023
Marleina Kerapa	Parent Rep	Elected	Dec 2023
Deanna Hinde	Presiding Member	Elected	Sept 2022
James Henderson	Parent Rep	Co-Opted	Sept 2022

OTUMOETAI INTERMEDIATE SCHOOL

Kiwisport Statement

For the year ended 31 December 2022

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

In 2022 the School received funding of \$13,091 (2021: \$12,631) to increase our student participation in organised sport.

There are 31 sports happening at the School. The Kiwisport funding was spent on employing a Sports Co-ordinator who ensures smooth running and organising of all sports and student involvement.



Good Employer Statement

Ōtūmoetai Intermediate School complies with Education and Training Act 2020 requirements to be a good employer for the year ending 31 December 2023.

This can be seen through the following employment-related policies which are available on our school website:

<https://otuinterschool.nz/>

- Concerns and Complaints Policy
- Staff Development Policy
- Health and Safety Policy
- Personnel Policy
- Protected Disclosure Policy
- Staff Discretionary Leave Policy
- Staff Performance Management Policy
- Unit Allocation Policy
- Appointments Policy
- Equal Employment Opportunity Policy
- Sexual Harassment Policy

Each year the Board of Trustees and Senior Management review how the school is performing against each of these policies to ensure continued compliance as a Good Employer.

Charter 2023

CONTENTS

1. Mission Statement
2. School Goals
3. School Vision
4. Strategic Plan
5. Annual Plan
6. Cultural Diversity
7. 2022 Analysis of Variance
8. NELP



School Number 1878

Compliance

Otumoetai Intermediate School is obligated and committed to:

1. Fulfilling all the requirements set out in the National Education Learning Priorities (NELP)
2. Administering the School according to the Education and Training Act 2020
3. Delivering the curriculum to all students in a balanced programme as outlined in the National Curriculum Statements.

Otumoetai Intermediate School Charter 2023

Values

Respect. **Manaakitanga, Kaitiakitanga**
In all contexts as a learning community we will demonstrate respect for each other, our differences and our property. Equal rights in all aspects of school life will be ensured. All of our actions will develop respect for our ecological sustainability and contribute towards a global community that benefits all life.

Integrity. **Wairuatanga**
At Otumoetai Intermediate we will act ethically by showing honesty, responsibility and accountability in all our actions. We will make good choices and resist pressure to behave otherwise.

Excellence. **Kotahitanga**
At Otumoetai Intermediate we will strive for excellence in all that we do. All learners both staff and student will demonstrate high expectations of themselves and others and a strong belief that we can achieve. Self-efficacy will be high.

Diversity. **Whanaungatanga**
At Otumoetai Intermediate we will value difference. Diversity is illustrated in many forms, culture, beliefs, and life experiences. It will be recognised in actions and interactions appropriately. Different communities and all that they represent will be recognised and valued.

Pride. **Mana Motuhake**
Otumoetai Intermediate staff and students will place a high value on developing the skills to reflect, think critically and create. These skills will be developed in all contexts of learning.

School Motto

"Hope Strive Achieve"

Kia oke ngātahi tātou, ka eke ate
taumata o angitu
When we strive as one, we ascend the
pinnacles of success

Mission Statement

For our students to be confident, connected, actively involved and Becoming lifelong learners.

Overall Strategic Goals

1. All students will experience effective learning in a positive environment.
2. The school will foster the partnership between whanau (families) and school where learning is nurtured.
3. The school will recruit and enable staff with the ability to meet school expectations.
4. The school will ensure all students will develop the skills and competencies to live in a global community.
5. The school will ensure all students are given opportunities to develop to their full potential.
6. The school will focus on the emerging adolescent and the unique needs of this age group in their development.
7. The school will seek ways to be innovative and develop a culture of self-improvement.

Otumoetai Intermediate School

Vision

Each student's experience involves:

- Knowing the school wide vision.
- Knowing specific learning intentions and success criteria for their learning.
- Learning that is connected to their real world (21st century).
- Challenging goals to ensure progress.
- Being given frequent verbal and written feedback and feed forward on their learning and achievement.
- High expectations by the teacher of all students
- Effective teaching.
- Regular, direct, purposeful instruction.
- Priority given to literacy and numeracy skills within an integrated programme.
- Being valued as an individual.
- Having their culture and ethnicity recognised and valued.
- Having a sense of belonging.
- Being in an orderly, tidy, purposeful learning area.
- Access to our well-resourced facilities and equipment.
- Having models of excellence displayed.
- Being in a motivating and stimulating environment.
- Being reflective on own learning in an emotionally safe environment.
- Being affirmed for success.
- Positive relations with teacher and other students.
- Being treated fairly and consistently.
- Feeling safe emotionally and physically.

Deliberate actions for high student achievement:

- Unrelenting focus by all staff, students and parents on high levels of achievement
- Entrepreneurial approach to school organisation and Culture.
- Learning that is connected to the students' real world. e.g.: e-learning.
- All students develop challenging goals to ensure Progress.
- All students being given frequent verbal and written feed back and feed forward on their learning and Achievement.
- Parents receive personalised communication Regularly.
- High expectations by the teacher of all students.
- Effective learning in every class room.
- Regular, direct, purposeful instruction in all curriculum areas.
- Priority given to literacy and numeracy skills within an integrated programme.
- All students valued as individuals and actively involved in their learning and decision making.
- All students have their culture and ethnicity recognised and valued.
- School wide focus on teacher pedagogy and heutagogy.
- Differentiated Professional Learning for teachers.
- Teachers actively engaged in independent teacher inquiry and knowledge building.

Underpinning Assumptions:

- Students of this age need teaching and classroom interactions that connect with their developmental needs and personal experiences.
- All students can achieve.
- Every student learns at a different rate.
- Regular feedback and feed forward is critical for learning to occur.
- Intelligence can change and grow and is multi-faceted
- Profound learning requires self-motivation and collaborative action.
- Information and communication technology will continue to have a significant role in how people communicate, access and manipulate information.
- Emerging adolescents need to be provided with a wide variety of opportunities and experiences.
- Mentoring is a powerful learning strategy.

School Curriculum

Emphasis on:

- Connecting with the lives of our students in a meaningful way.
- Creativity.
- Increasing student voice.
- Integration of learning areas.
- Inquiry learning.
- Māori learning as Māori
- Key competencies.
- Values.
- E-learning.
- Emerging adolescent developmental stages.

Strategic Plan 2023-2024

Strategic Goals

Strategic goal 1.

All students will experience effective learning in a positive environment.

NELP 1, 3, 4

Strategic Goal 2:

The school will foster the partnership between whanau (families) and school where learning is nurtured.

NELP 2, 3

Annual Aims

1a) To increase the number of students achieving at or above expected curriculum levels in Reading.

1b) To increase the number of students achieving at or above expected curriculum levels in Writing.

1c) To increase the number of students achieving at or above expected curriculum levels in Maths.

1d) To increase the number of Maori students achieving at or above expected curriculum levels in reading.

1e) To increase the number of Maori students achieving at or above expected curriculum levels in Writing.

1f) To increase the number of Māori students achieving at or above expected curriculum levels in mathematics.

2a) To strengthen communication between home and school so that all students are supported by home and school in their learning.

2b) To develop communication between home and school so that Māori students are supported by home and school in their learning.

2c) Teachers to develop effective interactive communication processes for their class (s)

2023 Targets

For at least 85% of our year 7 and year 8 students to achieve at or above their appropriate NZC level in reading. To lift and accelerate the students who have entered school below and well below level 3 in the curriculum.

For at least 85% of our year 7 and year 8 students to achieve at or above their appropriate NZC level in mathematics. To lift and accelerate the students who have entered school below and well below level 3 in the curriculum.

Kāhui Ako: Achievement challenge:

For at least 85% of our year 7 and year 8 students to achieve at or above their appropriate NZC level in writing. To lift and accelerate the students who have entered school below and well below level 3 in the curriculum.

All parents are actively encouraged and engaged in two-way interactive communication with school. Māori parents in particular have a greater involvement with their child's learning.

Strategic Goal 3:

The school will recruit and enable staff with the ability to meet school expectations.

NELP 6

3a) Teachers engage in professional readings and learning conversations with their colleagues which lead to personal reflection and development of professional practice.

3b) Teachers use inquiry to identify and meet their professional learning needs.

3c) Teachers use formative practice to meet the needs and interests of their students.

3d) Teachers shall develop communication between home and school to support student learning and well-being.

3e) Teachers will take an active part in the individualised professional learning process with self-improvement being a priority.

3f) Staff welfare will be monitored and reported at each Monthly board meeting.

1. All staff demonstrate positive relations with all students and colleagues.
2. All staff have high expectations for student achievement school wide.
3. Teachers have the skills to develop effective 21st century learning in their class.
4. Teacher competency is at a high level of attainment and demonstrated daily.
5. Each teacher is able to demonstrate high levels of student achievement in their class.
6. All students are valued as individuals and actively involved in their learning.
7. **All staff understand and support school and Kāhui Ako priorities for student learning. (Achievement Challenge)**
8. Teachers demonstrate active engagement in independent teacher inquiry and knowledge building.
9. Staff welfare is nurtured.

Strategic Goal 4:

The school will ensure all students will develop the skills and competencies to live in a global community.

NELP 7

4a) Students make progress, achieve and experience success against individual goals co-constructed with the teacher.

4b) Each student experiences learning in practical life skills including self- sufficiency with key competencies integrated at all levels of school life.

4c) Students are provided with a wide variety of opportunities in sporting, cultural and social activities.

1. Students demonstrate high levels of ICT use in their learning.
2. Clear focus school wide and for individual students, evident on core skills in reading, writing and mathematics.
3. Each student experiences learning in practical life skills including self- sufficiency.
4. Key competencies integrated at all levels of school life.
5. School Health curriculum includes cyber safety and this is taught regularly under our Keeping Safe programme.
6. Students are creative and critical thinkers.
7. Students show they are independent and able to manage themselves.
8. Students show they care for and have empathy towards others.
9. **Students feel included through school wide recognition and acknowledgement of their individual culture. (Kāhui Ako Achm't Challenge)**

Strategic Goal 5:

The school will ensure all students are given opportunities to develop to their full potential.

NELP 4, 5

5a) Each student has a strong voice in his or her learning.

5b) Regular feed-back and feed-forward is given to each student orally and in writing (student workbooks) Each student is provided with regular, evidence based purposeful and direct instruction.

5c) Every student is made to feel valued.
Culturally responsive pedagogy is evident in every class room.

5d) We will strive towards targeted opportunities for each student to develop their full potential.

Students with learning support needs are supported in their learning so that they can progress in relation to the New Zealand Curriculum and fully participate in and contribute to the school and their community environment.
(Kāhui Ako achievement challenge)

Each student experiences positive relationships with his / her teacher (s)

The school has a fully inclusive environment.

Culturally responsive pedagogy is evident in every class room. (Kāhui Ako achievement challenge)

Strategic Goal 6:

The school will focus on the emerging adolescent and the unique needs of this age group in their development.

NELP 1, 2, 4

6a) Students to have access to quality ICT and software to support their learning.

6b) Learning is connected to the lives of the students in a meaningful way.

6c) Each student's culture and ethnicity is recognised, valued and they feel included.

1. Each student's developmental needs recognised and understood by staff.
2. Neurological development in the adolescent brain recognised and understood by staff.
3. Pastoral care practices at all levels reflect sensitivity towards the emerging adolescent and his or her needs.
4. Communication practices are strong yet sensitive to the needs of the student.
5. Each teacher recognises, understands the need for and actively promotes a culturally inclusive learning environment. All students will be encouraged and expected to be active participants in their learning.
6. The school will work closely with the MICAMHs Clinicians in the area of child and adolescent mental and physical health.

Strategic Goal 7:

The school will seek ways to be innovative and develop a culture of self-improvement.

NELP 1, 3

7a) Teachers and students to have access to quality ICT and software to support their teaching and student learning.

7b) Teachers and students become proficient with mobile learning devices integrated in student learning.

7c) Entrepreneurial approach to school organisation and culture
Learning that is connected to the students' real world
e.g.: e-learning

1. Staff and board actively engage in self-review at all levels of school operations.
2. Staff and students are encouraged to reflect and provide input into how we could do things better.
3. All school personnel keep up to date with current trends and innovations in their area of responsibility.
4. A culture of continuous improvement is reflected by staff and student action.
5. The school is an early adopter of ideas, practices and technologies that enhance student learning.
6. School personnel actively interact and engage in professional learning with internal and external experts.

Ōtūmoetai Intermediate School Annual Plan 2023

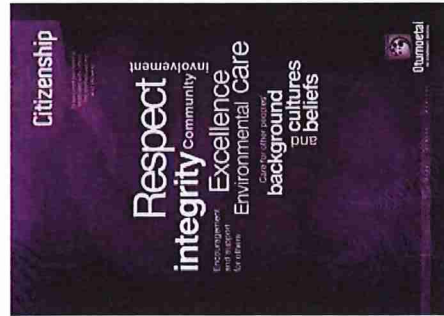
(Supporting annual aims)

Curriculum: Raising Student Achievement

NELP: 1,2,3,4,5,6,7 See appendix

- Our **focus** will be on what our students need to thrive in the future, moving from a 19th century education to a personalised student led 21st century learner approach that develops the gifts and talents of all our students.
- Develop each teacher's skill and knowledge by involvement in a differentiated personal inquiry approach, based on identified need. Each focus below will apply to only those teachers with an identified need.
- Continue to develop teacher ability to effectively manage a learning environment, gather diagnostic data against succinct learning intentions and success criteria. This will be the foundation for future planning and track student progress.
- Continue to develop teacher skill when in-depth teaching in questioning, deliberate acts of teaching and deepening the level of student thinking.
- Continue to develop teacher and student knowledge around identification and articulation of clear learning intentions and success criteria and the learning caused for students.
- Continue to develop teacher skill and knowledge around the delivery of an integrated curriculum moving into a model of inquiry.
- **Continue to develop teachers' skill in writing, reading and mathematics instruction using internal leaders and Within School Teachers.**
- **Implement the Histories in schools curriculum.**
- Participate in the Ōtūmoetai Community of Learners/ Kāhui Ako with our contributing schools and nearest secondary schools.
- Key competencies will be evident and embedded in all of the curriculum areas. Diagnostic data will be gathered around student's progress with these.
- Continue to develop and provide quality learning opportunities in all curriculum for our Gifted and Talented students.
- Provide effective teacher aides to support the learning of students in the special needs clusters.
- **Further develop inclusive practice by all personnel in the school. (Kāhui Ako achievement challenge)**
- The multiliteracy programme to continue to accelerate and support those students achieving well below the expected standard in reading.
- The Booster class to continue to accelerate and support the students below expectation in reading and mathematics. Term 1, and 3, Year 8, Term 2 and 4, Year 7.
- **A focus on Learning Support and Maori students will continue to be part of the learning conversations that are a major component of the weekly team meetings. (Kāhui Ako achievement challenge)**
- Success in all areas of the curriculum will be celebrated at class, team and whole school level.
- Information evenings will be held to deepen the understanding for our parents of what 21st century education need to look like.
- Reading and Mathematics evenings to inform and enhance parent ability to support the learning of those students who need an accelerated learning programme. Term 1 And 3.

Each class room in the school has the following posters on display and these are used as reference points on a daily basis to focus students and teachers on key aspects of our school vision and key goals.



Self Review: Raising Student Achievement

ANNUAL SCHOOL SELF REVIEW PLAN

Key Goals Related To Vision

- To develop key competencies as attributes evident in all our students.
- To have all students with the capabilities achieve at or above the appropriate curriculum level in reading writing and mathematics.
- To develop student metacognition / voice.
- To value and enhance the diverse characteristics of our students.
- To develop the emerging adolescent.
- For the curriculum to connect more to the lives of our students in order to be more meaningful e.g. the use of social media.
- To move towards an integrated / inquiry approach.

1. Strategic Reviews

Board review. One strategic goal per month and adjustments made to Charter. If necessary any actions further review etc. delegated to Principal.

Learning

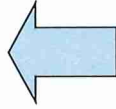
- Education Review Office on a scheduled basis. Working with us in 2022-2023. (Our last ERO review was in 2014.)
- Board reviews. One strategic goal per month. If necessary any actions further review etc. delegated to Principal.
- School wide reviews in reading writing and mathematics. Beginning of year - Analysis and recommendations made by deputy principal curriculum.
- Staff discussion and input at staff meetings.
- Snapshots - Midyear to determine progress and achievement. End of year to establish value added and achievement. (Internal and CEM testing by college).
- Discussion by lead teachers at Ōtūmoetai Kāhui Ako meetings.
- Student sample of their voice sought around learning and issues.
- Parental consultation both oral and written. PTA, Māori whanau, Iwi, International Student group.
- Review of research and exploration of an Integrated Curriculum approach by a group interested in developing this within their classrooms.
- A working party to be formed to research and develop ideas for the use of social media for learning and communication in all areas.

Pastoral

- Education Review Office on a scheduled basis. Working with us in 2023
- Student Hauora data from 2018,2020 and 2021 analysed to inform how we meet the goals in our 2022-2024 strategic plan.
- Student data from MOE Every Day Matters attendance reports analysed to inform further actions to be taken to improve attendance.
- Staff climate surveys and dialogue meetings.
- Annual consultation with contributing schools and college.
- Parental consultation and meetings with appropriate stakeholders.

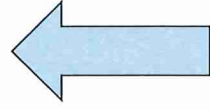
Students Strengths and Learning needs

1. Whole school trends – school wide snapshot of data - Feb/Nov. analysed and discussed. Midyear snapshots as necessary. Cohorts considered: ESOL, Māori, NZ European.
2. Formative assessment from school wide data plus teacher own judgment.
3. Analysis of above and actions identified reading, writing maths reports.
4. Team discussions around specific learning for students and interpretation of data information. Programmes to meet identified needs developed, led by teaching team leaders.
5. Student Meta cognition reviewed both oral and using templates on a regular basis.
6. Learning conversations around specific students and their needs a part of each team meeting.
7. Incorporate feed-back from students, whanau, Iwi, Kāhui Ako



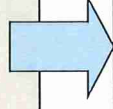
Outcomes of Actions

1. Diagnostic data gathered.
2. Action plans reviewed and updated.
3. Snapshots of progress taken at appropriate times and when scheduled.
4. Outcomes reflected on and reviewed at team meetings.
5. Reporting to parents - Term 1 social and initial academic data, midyear report reading, writing and mathematics, end of year summative and where to next encompassing all aspects.
6. End of year summative assessment school wide trends.
7. Meeting with parents organised e.g. reading / mathematics meetings to assist readers having difficulty and to establish a home school relationship.



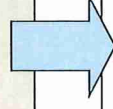
Teacher Professional Strengths and Learning needs (Teacher Inquiry)

1. Teacher strengths and needs identified.
2. Feedback given individually on review of progress after each observation by DP.
3. Mentoring coaching pairs reflection.
4. Reflection by teachers around "What do effective teachers do that others do not"
5. Discussion in coaching pairs and at team meetings.
6. Professional growth Cycle discussion / attestation meetings with Assistant Principal, Deputy Principal.
7. Senior management appraisal and attestation.
8. Individual teacher identification of what they are going to research to meet and enhance their self-identified learning needs.
9. As a result of staff discussion, a focus will be on the transfer of what the data is telling us into the planning and success criteria for student learning.



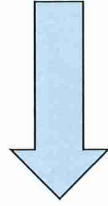
Teacher Engagement in Professional Learning

1. Whole school and Kāhui Ako PLD to enhance identified needs in terms of curriculum knowledge and skills.
2. Teacher strengths used to support others.
3. Staff meetings to moderate and discuss student learning.
4. Discussion and collaboration between teachers.
5. Professional learning conversations at team meetings around reflection and review of actions and programme development.
6. Meetings, observations and moderation of learning with contributing schools and college.
7. Teacher observation of others as part of the coaching / mentoring.
8. Participation in Kāhui Ako PLD provision.



Students Engagement in new learning

1. 80% or greater student engagement at any given time in the learning.
2. Student reflection on their own learning.
3. Students able to articulate their needs and the success criteria to meet these.
4. Feedback / forward reflected and acted upon by students.
5. Peer assessment / review occurring against identified success criteria.
6. Parental reading / mathematics evenings to support student engagement in the learning.
7. Behaviour support (deputy principal, student support teacher, kaiwhakahaere, and school liaison RTLB.) constantly reflecting and reviewing on student behaviour and making changes to actions as appropriate.
8. Review meetings held weekly with the above plus Principal.
9. Kāhui Ako Learning Support implemented
10. An approach using Integration of the curriculum under development to enhance student engagement.



3. Emergent Reviews

Initiated by any personnel who have an interest, are stakeholders or community based groups. They may arise from “bright ideas”, a concern or based on an identified need. The purpose will always be enhanced learning outcomes for our students. They may take a variety of forms e.g. oral, written surveys or an inquiry approach.

NB: The school leadership team have identified a need to focus on student hauora and wellbeing as a result of the Covid-19 pandemic.

The strategic plan identifies the following priorities: Collaboration and relationship building, building student sense of belonging and self-efficacy, collective teacher efficacy and inclusive practices.

Some that regularly occur are:

- Education Outside the Classroom reviews annually at the end of the cycle.
- Sports - Immediately after the event is held.
- Behaviour in the playground as these is identified either by staff, students or teams.
- The Arts – Annually and also after the events. May be all staff, or groups interested to participate or at team meetings with Principal in attendance.
- Learning areas such as technology will be through group dialogue / discussion involving teachers involved e.g. laptop classes or technology specialist area technology teachers.
- Gifted and talented student learning. Teachers with those groups in their classrooms meet to reflect and review on a regular time schedule.
- Emotional environment – promoting a safe environment for all on the school site.
- Health and safety systems and procedures including records kept.
- Effective use of resources both human and physical.

Personnel: Raising Student Achievement

- New BOT members participate in professional development around their new roles.
- Comply with legislative responsibilities as a good employer.
- Ensure all provisions of personnel policy are met.
- Recruit and enable staff with the ability to meet school expectations.
- Implement and support an effective staff development programme that includes personal professional growth that will enhance the quality of teaching and learning.

Finance and Property

- Audit 2022 accounts.
- Monitor 2023 budget.
- Monthly treasurer reports at BOT meetings.
- Prepare 2023 budget in line with 2023 school operational plan.
- Fund approved priorities of 2023-refer to 2023 budget.
- Education services used as finance service.
- Board property subcommittee to prepare strategic plan for school property.
- Implement 10Y Property Plan and 5Y Property Plan.
- Conservation Area Development Project continued.
- Programmed Maintenance contract continued.

Health and Safety:

- Ensure Health and Safety Plan complies in full with legislation to guarantee the safety of students and employees.
- Active participation by all staff in health and safety discussions and procedures.
- Health Community Consultation conducted in May 2020 and sexuality education further addressed later in the year.
- Hazards identified and removed.
- Pupil attendance monitored-daily.
- Emergency procedures practised each term.
- Include cyber safety, sun safety, water safety & road safety in term unit plans.
- Electricity contracts to be secured to ensure safety-testing & tagging, annual electrical inspection & 6 monthly check.
- Maintain security camera network.
- Staff aware of and familiar with: guidelines for ethical and professional behaviour, privacy officer, disclosures officer.
- Inclusive practices school wide and Speak Up policy in place and operating.
- Learning Support Coordinators and MICAMH's clinicians integrated further into pastoral care practices and support.

Policies and Procedures

- School to comply with all general legislation requirements.
- Regular review of school policies and procedures carried out.
- Revised school policies communicated to parents and community through the school website.

Ōtūmoetai Intermediate School and Cultural Diversity

New Zealand Cultural Diversity

23% Māori 61% NZ European 2% Pacific Island 14% other

- All cultures within the school will be valued, accepted and celebrated through active encouragement of an inclusive school culture and values.
- Staff members will ensure that students from all cultures are treated with respect and dignity, and will actively work towards maximising the potential of each student irrespective of cultural backgrounds.

The Unique Position of the Māori Culture

- All staff members are expected to develop an awareness of Tikanga Māori (Maori culture and protocol) and Te Reo Māori (Maori language); and incorporate these into classroom programmes. They are expected to meet the cultural competencies outlined in Tataiako.
- Ōtūmoetai Intermediate School will provide the means of fostering better cultural understanding consistent with the Treaty of Waitangi.

What reasonable steps will the school take to incorporate Tikanga Māori (Maori protocol and culture) into the school's curriculum?

- Daily programmes will have a dimension where possible: greetings, commands, language related to everyday objects, days, months, number.
- Each integrated unit will include components as appropriate to the topic and the class level.
- Professional development and support of staff, on the understandings they need to develop with their students. Workshops throughout the year using local resource personnel and Tataiako as the basis for development.
- Use of Pohiri to welcome year 7's at start of year and visitors /international students throughout the year.
- Students individually place their iwi affiliations on a map of New Zealand. Followed up with whakapapa sessions with Kaumatua and other resource people in community.
- The further development of Te Ara Poutama assisted by senior students from Otūmoetai College and Te Wharekura o Mauao.
- The introduction of new award ribbons to recognise Te Reo and Tikanga acquisition by students.
- The employment of a kaiarahi i te reo full time to assist with the development of Te Ao Māori school wide.

What will the school do to provide instruction in Te Reo Māori (Maori language) for full time students whose parents ask for it?

- All such requests will be given full and careful consideration by the Board of Trustees with the regard to:
 - Place the student in a class with a Māori speaking teacher and or provide opportunities for regular workshops in Te Reo Māori immersion.
 - A Kaiarahi i te reo to deliver Te Reo regularly to all classes.
 - Refer students to Tauranga Intermediate bilingual unit or
 - Provide Te Reo through correspondence or other online providers.

What steps will be taken to discover the views and concerns of the school's Māori community?

- Encourage parents of Māori students to become a Board of Trustees member
- Māori community consulted in various ways
 - Report evenings
 - Parent workshops
 - Newsletters
 - School events involving students
 - Informal dealings with families
 - Maintaining open door practice encouraging families to approach the school
- Kapa Haka Group
 - The Kapa Haka group performing to the school, wider community and guests on a regular basis.
- **Community of Learning**
 - The school will work closely with Aramahou Ririrui, Kāhui Ako: Across school teacher in strengthening our culturally responsive pedagogy.
 - The school will work closely with Bobby Ketu, HOD Māori at Otūmoetai College and his team.
 - The school will liaise closely with iwi representatives and Whanau reference group to build on Māori initiatives to date and help develop a Te Ao Māori Local Curriculum.

How we did in 2022

Discussion:

We view our learning journey over a two-year period.

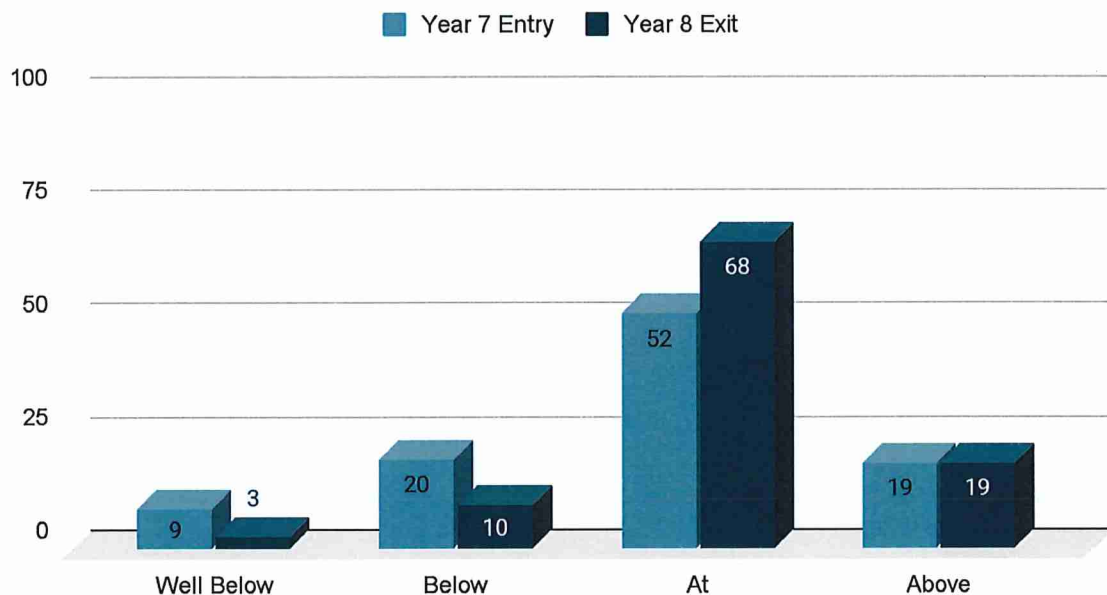
At Ōtūmoetai Intermediate, a major area of strength is the ability of our teachers to accelerate student learning and achievement levels over the short space of two years they attend our school. A significant number of year 7 students enter our school with their reading, writing and mathematics below or well below the expected curriculum level. The following graphs demonstrate the gains made by the 2022 year 8 students as a group from their entry to Intermediate in 2021 to exit for College at the end of 2022.

By the end of year 8, the school has met its aspirational target of 85% of students graduating at or above the expected curriculum level in Reading. The final result was 87%. We are particularly satisfied with this result coming after a number of disruptive years of learning with the presence of Covid-19. The students are to be commended for coping admirably over this time and continuing to make learning gains.

Our final results in Writing and Maths (78% and 80% respectively at or above the expected curriculum level) were also strong, although the 85% aspirational target was not achieved in both subjects. These are good results and again a testament to the resilience of Ōtūmoetai students and the strength of the teaching staff.

Reading

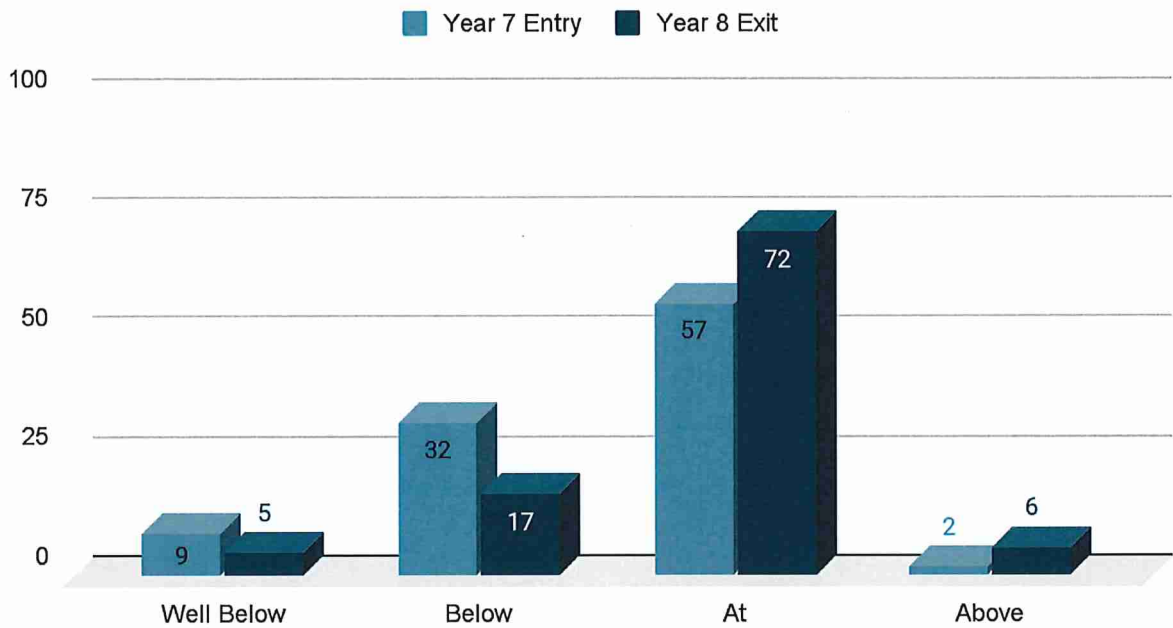
Entry to Exit Reading percentage Year 7 2021 - Year 8 2022



As our Year 8 students graduate from school, the data shows **87%** of those students are at or above the expected curriculum level for Reading at the end of the year.

Writing

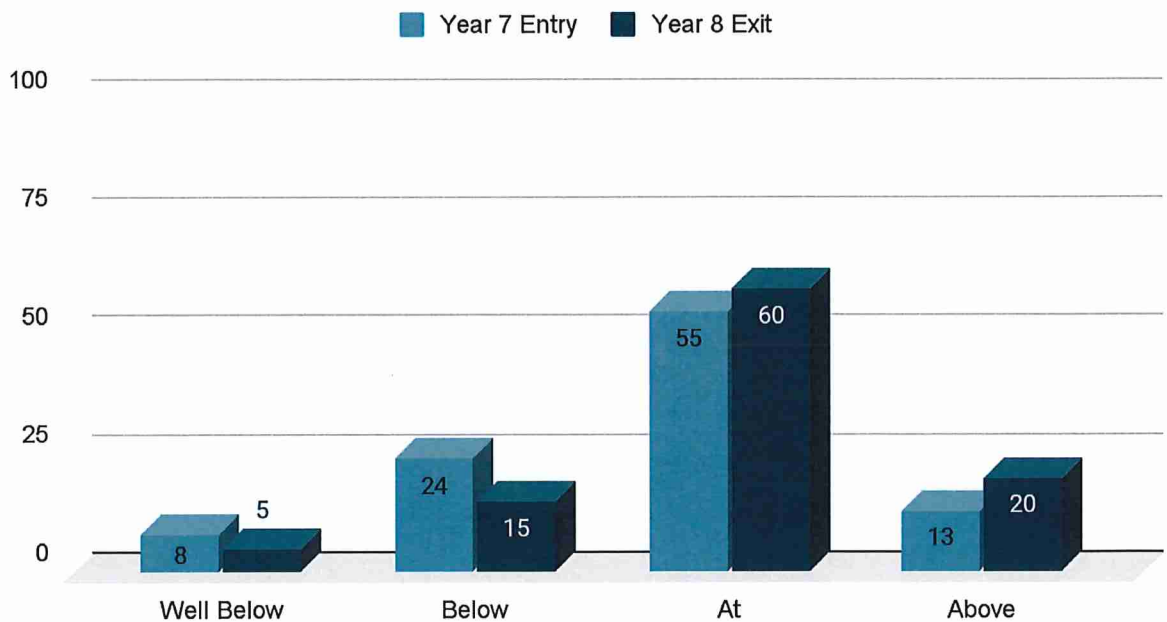
Entry to Exit Writing percentage Year 7 2021 - Year 8 2022



As the year 8 students graduate from our school, school wide data shows **78%** are achieving at or above expectation in Writing which is slightly down on the previous year's result.

Maths

Entry to Exit Maths percentage Year 7 2021 - Year 8 2022



As the year 8 students graduate from our school, our school wide data shows **80%** are achieving

at or above expectation in Mathematics.

Commentary: Summary of learning analysis

The student data shows that it has been another good year of learning for the majority of our students at Ōtūmoetai Intermediate. This is despite a number of disrupted years for these students due to the Covid-19 pandemic. Both students and staff are to be commended for maintaining learning standards during these trying times from which we still see a high number of students being absent from school for periods of time. We are now hoping the pandemic is largely behind us and that 2023 will be a very settled year at school.

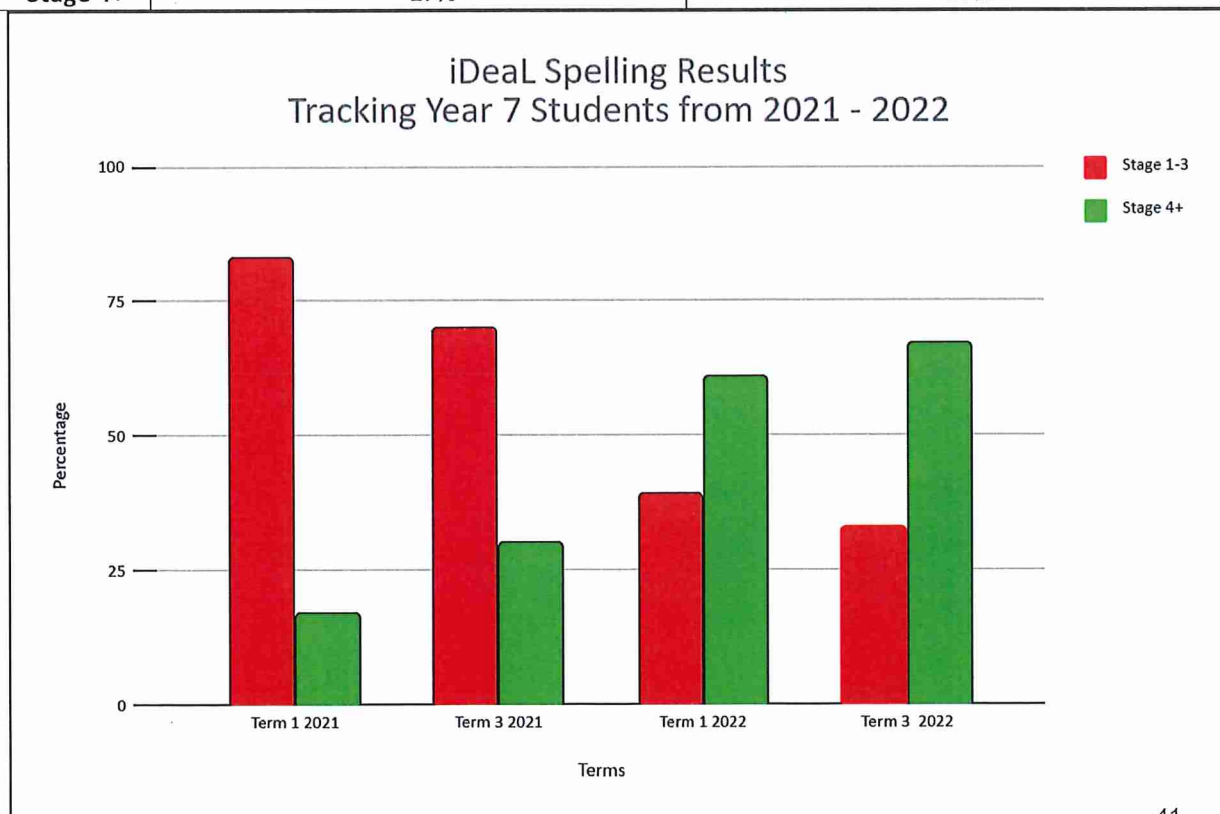
Teachers have continued to embed the ‘Writer’s Toolbox’ programme into classroom practice. The school wide writing results achieved this year are slightly down on last year’s results, however, the College is indicating a solid improvement in the standard of writing from the year 9 cohort and we are expecting this trend to continue. The Kāhui Ako Literacy Leaders and the Across School Teacher will maintain a focus on writing in the 2023 year. Our Within School Writing Teacher will be tasked with ensuring the writing gains being made by the school are maintained.

In 2021, the school embarked on a Structured Literacy PLD journey with the provider: “Learning Matters,” to upskill our teachers on how to teach phonetic awareness, alphabetic principles and reading fluency. Providing these reading ‘building blocks’ for struggling readers, and in particular for our dyslexic students, should assist to plug the gaps that we were seeing with these students when they arrived in our school.

Structured Literacy programmes are now taking place on a daily basis across the school and the data shows there has been substantial improvement in students’ spelling over the last two years.

School-Wide Spelling Results – Year 8’s from 2021-2022

iDeaL Stages	2021 – Term 1 Percentage of OIS Students at this Stage	2022 – Term 3 Percentage of OIS Students at this Stage
Stages 1-3	83%	33%
Stage 4+	17%	67%



iDeal Stages	2021 – Term 1 Percentage of OIS Students at this Stage	2022 – Term 3 Percentage of OIS Students at this Stage
Stage 1	2%	0.2%
Stage 2	22%	5.8%
Stage 3	59%	27%
Stage 4	17%	53%
Stage 4+	Did not get data	15%

In 2022, our two senior teachers appointed as reading WSTs provided PLD to classroom teachers on aspects of the reading curriculum, also providing resources that could be used to teach those aspects of reading. Along with observing in classrooms and supporting teachers, these teachers will continue PLD sessions in 2023. Our existing and highly effective multi lit teachers will continue to target small groups of struggling students and support them with their reading. Our Structured Literacy WSTs will ensure teachers are delivering an outstanding spelling programme and will also be training staff in the use of decodable texts.

Maths programmes continue to combine a mix of problem solving sessions, direct teaching and practice, backed up by the use of the Mangahigh online maths resource, to consolidate and extend maths knowledge and skills. In 2022, we added a new structure to our maths programmes to ensure coverage of the year 7 and 8 maths curriculum. This included pre and post assessments for each area of maths taught giving teachers the ability to 'heat map' and track the progress of student learning. We are currently assessing the effectiveness of our 2022 maths programme. Maths results were slightly down on the previous year although they were still strong. We have appointed an MST trained teacher as our Within School Maths teacher for 2023. This teacher will be tasked with ensuring problem solving maths (DMIC) is being used well in classrooms and will provide PLD to teachers on the most up to date pedagogy in this area.

Major focus for growth in 2023 will be:

- Continue to embed the Structured Literacy programme into classrooms. Testing in classes will start early and from there, teachers will be expected to identify where to start their programmes and be consistent in their approach across teams and across the school. Our Within School Structured Literacy teachers in charge of this aspect of literacy will maintain oversight.
- Guided by our Within School reading teachers, ensure that all classroom reading programmes are robust and that they are extending the learning of students. These teachers will provide regular PLD sessions for teachers across the year.
- Maths is a focus area for the Kāhui Ako. We have the benefit of having the maths Across School Teacher for the Kāhui Ako as a teacher in our school. We also have a highly trained MST teacher appointed as Within School Teacher. We will use the skills of both these teachers to identify areas in which maths programmes can improve in the school and provide teachers with support in those areas.
- The scope and sequence approach to teaching maths at year 7 and year 8 will be assessed and refined where necessary after feedback from teachers. We were fortunate to receive this programme from Mount Intermediate and we are grateful for their assistance.
- We will continue to consolidate the writing skill base of our teachers using the expertise of our writing WST who will support teachers and model excellence in the teaching of writing for them. We have refined the school writing rubric assessment system to ensure it is in line with rubrics being used across the Kāhui Ako in order to bring about consistency to the way

writing is assessed through years 0 – 10.

- We are currently working on the 'how' of introducing the new New Zealand Histories curriculum into classroom programmes. It is likely this will be integrated slowly across the course of the year.
- Improve the use of Te reo in the classroom. Teachers are being assisted in the use of Te reo in the classroom by attending Monday afternoon Te reo sessions run by Miss Neale. These sessions have been well attended and will continue into 2023. A good number of teachers have participated in the Te Ahu o te Reo Māori programme and others are intending to undertake this course in 2023.

It will be another busy and highly focused year of continuous improvement for all learners in the school - both teachers and students. Staff will once again be called upon to meet the challenges that our new Year 7 cohort brings with them.

Gifted and Talented students

As in recent years, the two year journey for students at Ōtūmoetai Intermediate has resulted in an acceleration of learning for many of those students. This has occurred for students of all academic abilities including those for whom accessing the school curriculum is difficult and also for those students who demonstrate high ability. The Mangahigh resource has been well utilised in classrooms and has proved an effective tool to extend our gifted maths students into level 5 of the curriculum and beyond. The Rutherford and Mansfield academic academies run on Fridays provide an opportunity for high academic achievers to be further extended.

Students with Learning Support Needs

For students entering our school who were functioning at level 2 or below, learning has been tracked very carefully by our Learning Support Coordinator. All of these students are identified for intervention and support across the course of a year. This intervention or support is in the shape of being part of a booster programme in literacy, maths or both, and/or in class support from a teacher aide or a part time teacher for at least part of the day.

In 2020, the school started a Learning Support class in year 7. The fundamental concept for this class was to group students with dyslexic traits and students whose confidence in learning had been eroded over their primary school years, in one class to better target their learning needs. This class has operated for three years and has been a huge success at lifting confidence and engagement of students. In 2022, a year 8 Learning Support class was added to ensure many of the same students are provided with ongoing support over two years. These classes will continue in 2023.

Reading:

For an extended group of low readers, the multilit programme was an outstanding success in 2022 producing excellent learning gains. We continued with an extended programme providing an opportunity for students to partake in read aloud/book discussion sessions with our multilit teachers. This has once again shown success and will be continued in 2023.

In addition to the above, the entire classroom teaching staff and teacher aides have been trained in delivering a structured literacy programme and have had a solid year of incorporating this into classroom programmes in 2022 with excellent results. Teachers are now well equipped to accelerate struggling readers within their reading programmes. We retain the skills of two within school teachers to monitor teacher programmes and support the SL programme in 2023.

In 2022, the school continued with both a year 7 and year 8 Learning Support class in which a large group of dyslexic students and students with a range similar learning difficulties had been grouped for learning. The new Learning Support Coordinator worked closely with the teachers in these classes to provide appropriate training and resources to best serve the learning needs of those students. A major focus with the students was to build self-efficacy as without this, these students often do not make the progress we would expect.

The Learning Support classes were a good success in 2023 as in previous years with many parents reporting that their child had made excellent gains not only with their learning, but in their confidence as a learner and their renewed enjoyment of school as a result. The staff involved in this success are to be commended again. For the first time, we have a roll over of staff in these rooms so there is continuity and therefore consistency from 2022 to 2023. Because of this, we would like to look at providing some PLD to these teachers in 2023 and 2024 to upskill them around teaching students with a range of learning difficulties.

Writing:

As a school, our writing results continue to be strong after the excellent PLD from Writer's Toolbox facilitators over a number of years to address this curriculum area. There was a slight dip in the overall leaver's results in 2022. This may well be accounted for by a shift at the end of last year from providing year end OTJs result (e.g. At, below, Above), to identifying precise curriculum levels for each student. This shift required intensive moderation of writing in teams at the end of 2022. Feedback from the college AST is that college teachers are positive about the continued improvement in writing at year 9 level. The Kāhui Ako has now finished its PLD with Writer's Toolbox facilitators and the school WST for writing will continue to ensure writing programmes are supported in the school

Mathematics:

The delivery of mathematics using a learning community (DMIC) has assisted the learning for many students. This approach has generally increased the engagement of students through mathematical discussion of problems. Students are encouraged to question each other and to seek clarification if they do not understand what is being discussed. This has had a positive impact on lifting their status in the classroom where they are beginning to see themselves as contributors to class discussions and are therefore perceived by other students as capable learners.

The school is moving to a balanced approach to teaching maths in 2023 using DMIC as one tool and incorporating explicit teaching sessions to ensure the curriculum is covered in a sequential way and the building blocks of maths are set before students move on. There will also be a focus on moving away from fixed ability grouping to a more flexible approach to learning whereby groups are fluid and participation is dictated by what is being taught and the learning gaps of the particular student.

OIS is in the fortunate position to have a within school maths teacher in 2023 who is MST trained. This resource will allow us to assist teachers with classroom practice and resources to support maths programmes.

Opportunities provided to all students

The teachers at Ōtūmoetai Intermediate are committed to the health and well-being of their students in every aspect of their development and strive to ensure they emerge from our school as well functioning contributors to society. They are to be commended for their efforts.

There is a robust and challenging sports programme in the school that provides all of our students with opportunities in 27 different sports. At an elite level, the school was able to once again participate in the 2022 AIMS GAMES National Sporting Championship after 3 years of Covid cancellations. It was another hugely successful tournament for the school with some fantastic results achieved. Our sports academy, which runs every Friday, provides an additional layer of training and education around sports, general health, and leadership for a selected group of high achieving students. The school fields a large number of teams in the local sports

competitions and in particular in volleyball, netball, hockey and basketball.

Participation rates in physical activity are high throughout the school with a robust physical education programme and a wide variety of inter class and other lunchtime games offered all year round. In 2023, we will be focusing on our class Health/PE programmes to ensure they are well thought through and organised and that they cater for a range of student needs. The focus will be on participation and also a skills based approach to teaching but also including important aspects of health and wellbeing.

All students experience specialist teaching in ICT, visual arts, music, drama and dance, hard materials, electronics, soft materials and food technology during their two years at our school. A science technology class was added in 2022 and was a great success.

Additional opportunities are provided in digital media, robotics, 3D printing, languages, literacy, and mathematics - including access to competitions in a number of these.

We encourage all students to experience as wide a variety of options as possible during their two years at Intermediate and to develop their key competencies. There is an ongoing emphasis on developing student self-efficacy, the key competencies, and the values that lead to increased student achievement across the curriculum as a whole.

Glossary

NELP: The statement of National Education and Learning Priorities

DMIC: Developing Mathematical Inquiry Community Programme developed by Dr Roberta Hunter, Massey University.

WTE: Write That Essay Programme developed by Dr Ian Hunter, University of Auckland.

Kāhui Ako: Ōtūmoetai Community of Schools / Learners

These are:

- Ōtūmoetai College
- Te Whare Kura o Mauao
- Ōtūmoetai Intermediate School
- Ōtūmoetai Primary School
- Pillans Point School
- Matua School
- Bellevue School
- Te kura o Manunui

NZC: New Zealand Curriculum.

AST: Across School Teacher. This is a Kāhui Ako role.

WST: Within School Teacher. This is a Kāhui Ako role.

SCHOOL TRANSFORMATION PLAN

February 2023 to December 2023

Assumptions Underpinning What We Do

- Students of this age need teaching and classroom interactions that provide them with meaning and address their developmental issues.
- Classrooms that are teacher focused, content driven and autocratic have no place at our school.
- All students can achieve high standards.
- Effective systems need to be in place for high expectations to be met.
- Regular feedback and feed forward are critical to all classroom interactions.
- There is a need to move from high confidence in the teaching of a subject or age group to high confidence in enabling the learning of young people.
- Intelligence can change and grow. It is multi-faceted and has to be measured using a range of techniques.
- The family and community are significant variables in learning.
- Learning has to be measured through demonstration of understanding.
- Every individual learns at a different rate: learning is non-sequential.
- Cognitive and emotional development are equally, if not more important than subject knowledge.
- Profound learning requires intrinsic motivation and collaborative approaches.
- Mentoring is the dominant learning strategy (for students and teachers).
- Teacher's coordinate and support learning: information and assessment are managed through ICT and cloud based applications.
- Assessment and reporting are based on portfolios of achievement (for students and teachers).
- Teachers need to master managing their class learning environment and have a comprehensive understanding of effective student learning before they are able to foster student inquiry learning in their class.
- Information and Communications Technology will continue to have a significant role in how people communicate, access and manipulate information.
- Social Media is taking a predominant role in how people communicate.

Action Towards Vision & Goals

Our school curriculum is defined by what occurs inside each classroom and for our school to move forward we need to undergo a transformation in what we do.

This involves a fundamental shift in understanding resulting in a new way of thinking, feeling and behaving in response to significant information and experience which is altering our existing perceptions and understandings.

Two important foci need to occur in our school:

1. **Our curriculum has to connect to the lives of our students in order to be meaningful.**
2. **Our students need to have a voice in the decisions about what they will learn and how they will learn it. (heutagogy)**

TO ACHIEVE THIS WE WILL:

Increasingly integrate our curriculum to best meet the needs of young adolescents. This begins with real life problems introduced as themes once a term across the whole school. Students will discuss their concerns about the world and be involved in the development of themes for their class/themselves.

To assist this transition, we have appointed an Integrated Curriculum Leader whose task it is to, over time, work with year 7 and year 8 teachers to look for opportunities to refine existing programmes to better integrate the curriculum.

Increasingly develop student inquiry learning where students are actively engaged in their learning and given increasing opportunities for collaboration.

3. Recognise that students today are part of a world that is active, mobile and ever-changing and our role is to ensure each student develops to their full potential. This will require an entrepreneurial approach to how we do things.
4. Recognise that teachers, who are developing new curricula in their classrooms and seeking connections to provide their students with relevant learning experiences, cannot make this transformation overnight. Transforming classroom learning can only be achieved by teachers working together to develop ways to allow for student voice, to integrate the curriculum and yet maintain a focus.
5. Focus on enabling teachers to develop the pedagogical skills to be effective. This requires teachers to use a teacher inquiry and knowledge-building cycle to promote valued student outcomes (pp 34-35 NZ Curriculum).
6. Seek ways to increase family and community involvement in student learning and to develop effective reporting to parents against national standards.
7. Seek ways to continue and enhance provision of a broad range of sporting, academic and cultural opportunities for all students.
8. We will proactively accommodate our young adolescent students' myriad of physical, emotional and social needs in every classroom.
9. We will actively seek ways for student collaboration and co-operation to become a bigger feature of their learning.
10. We will display the school vision and goals in prominent places in each classroom and throughout the school.
11. We will continue implementation of a personalised teacher professional development programme where mentoring and coaching are the predominant methods of learning.
12. We will review and develop strong systems and processes for quality assurance based on evidence gathered and personal portfolios of achievement for students and teachers.
13. We will ensure all teachers are aware of school expectations and develop the skills to carry out effective pedagogy / heutagogy based on those expectations.
14. Curriculum teams will collaboratively refine the school curriculum in all 8 learning areas with an integrated framework and incorporating the values and key competencies.
15. All teachers and students will have access to and incorporate ICT in the day-to-day interactions with parents and wider community as well as accessing and manipulating information as a key part of their learning.

VARIANCE REPORT ON TARGETS FOR STUDENT ACHIEVEMENT 2022



Analysis of variance

Otumoetai Intermediate School. MOE Number: 1878

<p>Focus:</p> <p>Strategic aim:</p> <p>Annual aim for 2022:</p> <p>Baseline data Feb, 2022:</p> <p>Targets 2022:</p>	<p>Reading</p> <p>For all students to be fully engaged in their learning and at least 85% achieving at or above curriculum expectation in reading.</p> <p>For 85% or more of our students including Māori and Pasifika to be achieving at or above expected curriculum level and to lift and accelerate the learning of students who entered the school below the expected curriculum level.</p> <p>The year 7 cohort saw 84% of the students enter our school at or above expected curriculum level. This was particularly high in comparison to previous years.</p> <p>The year 8 cohort saw 79% of the students commencing year 8 at or above expected curriculum level.</p> <p>85% of the Year 7 cohort are reading, responding to, and thinking critically about texts in order to meet the reading demands of the New Zealand Curriculum towards the end of level 3 and working in early level 4 or above.</p> <p>85% of the Year 8 cohort are reading, responding to, and thinking critically about texts in order to meet the reading demands of the New Zealand Curriculum at mid level 4 and above.</p>
<p>Actions (what did we do?)</p> <p>Unrelenting focus by all staff, students and parents on high levels of achievement.</p> <p>Entrepreneurial approach to school organisation and culture Learning that is connected to the students' real world (21st century).</p> <p>e.g.: e-learning</p> <p>All students develop challenging goals to ensure progress.</p> <p>All students are given frequent verbal and written feedback and feed forward on their learning and achievement.</p>	<p>Outcomes (what happened?)</p> <p>At year end:</p> <p>Year 7: a total of 83% of students were at or above expected curriculum level. This might indicate the start of year data was too high.</p> <p>Year 8: a total of 87% of students were at expected curriculum level.</p> <p>Maori Students:</p> <p>Reasons for the variance (why did it happen?)</p> <p>Overall:</p> <p>Students made good gains over their two year journey at OIS even though the 2021 and 2022 years were affected by Covid-19 disruptions. The start of year 7 reading results were particularly high at 84% students at or above their expected curriculum level. This would be where we expect them to be at the end of year 7 in the past. We will monitor this at the start of 2023 to see whether this is a trend or whether there were some</p> <p>Reasons for the variance (why did it happen?)</p> <p>Overall:</p> <p>We created a Learning Support Class at both year 7 and year 8 for 2022 following the success of trials of this class at year 7. Both classes operated successfully and for the first time in 2023 we will have continuity of teaching staff in these rooms in 2023.</p> <p>We will continue to drive the upskilling of teachers in Structured Literacy to ensure gaps in student learning from the primary schools are identified and addressed. Two Within School teachers will continue to oversee Structured</p> <p>Evaluation (where to next?)</p>

<p>Parents receive personalised communication regularly.</p> <p>High expectations by the teacher of all students. Effective learning in every classroom.</p> <p>Regular, direct, purposeful instruction in all curriculum areas.</p> <p>Priority given to literacy skills within an integrated programme.</p> <p>All students are valued as individuals and actively involved in their learning and decision making.</p> <p>All students have their culture and ethnicity recognised and valued.</p> <p>Differentiated Professional Learning for teachers</p> <p>Teachers actively engaged in independent teacher inquiry and knowledge building.</p> <p>Teacher continue to upskill in the Structured Literacy approach to teaching reading - focus on phonics, alphabetic principles and fluency</p> <p>The implementation of multi lit, a programme that struggling readers attend for a daily 30 minute period 1 – 1 with a trained adult for 30 sessions.</p> <p>Dedicated booster math classes ran in 2022 with MST trained teacher for students below expectation in reading.</p> <p>A Learning Support Class in year 7 and year 8.</p> <p>These classes were highly successful in 2022 and cater for low readers and readers with dyslexia.</p> <p>We also have an unrelenting focus on the enhancement of teacher's pedagogical knowledge in the delivery of reading programmes that accelerates the learning of Maori / Pasifika students.</p>	<p>Year 7 Māori students: 72% were at expected curriculum level.</p> <p>Year 8 Māori students: 73% were at or above expected curriculum level.</p> <p>Teacher judgment for the year 8 Māori students overall, shows on entry in 2021 as year 7's 45% (41 students) were sitting below expected curriculum level.</p> <p>In November 2022, on exit from the school as year 8's. This number has decreased to 27% (26) students.</p>	<p>inaccuracies around our assessment at the start of 2022.</p> <p>A continuing challenge continues to be accelerating the progress of our priority learners. Reading results for Maori students are still a concern, particularly at the year 7 level where there was little recorded shift of students from working below the expected curriculum level into at expected curriculum level. There were learning gains within levels but these are not reflected here.</p> <p>A big challenge in accelerating these students is changing their belief in themselves as learners. We do see better progress at year 8 which may suggest that Maori students in particular take time to settle into their school learning and accelerate when they develop a sense of belonging.</p> <p>For all struggling students, we need to look at ways we can do better. For 6 years, many have failed in a school system that serves them badly.</p> <p>When the delivery changes to a collaborative / group style of learning, such as in the writing and in mathematics, we appear to have some success. The deficit that needs to be addressed to move these students to a level where they can access the curriculum equitably is too big to achieve in two years. These students have the capacity to be excellent learners.</p> <p>As a school, we have also recognised the need to upskill teachers around the teaching of Phonetic awareness. Every classroom in the school has a Structured Literacy programme running. Results from our first full year doing this are excellent and the hope is we will see a bump in reading ability over the years to come as students become more confident having</p>	<p>Literacy in the school.</p> <p>Two more Within School Reading teachers will work to ensure reading programmes are robust and provide PLD to staff about how to best develop reading programmes.</p> <p>Maori and Pasifika students will continue to be a particular target group for 2023 and these strategies continued:</p> <ul style="list-style-type: none"> ● Professional learning on Tataiako (teacher cultural competencies) continued. ● Ongoing reflection on ensuring that contexts and vehicles used for leading learning are engaging and relevant for our Māori students. ● Identification of these students when gathering data and tracking progress. ● Pohiri to be part of all welcomes to our school. ● Te Reo and Tikanga is taught in classes by Matua Takiri. ● Every child has a mihi. ● All Māori students have their whakapapa identified on a map of New Zealand and understand where their iwi is located. All students have their cultural roots (whakapapa) identified on a world map. ● Tikanga Māori is acknowledged and valued school wide. <p>Key competencies will be evident and embedded in all of the curriculum areas.</p> <p>Our 2023 plan to enhance the Maori dimension in our school is in five parts and remains consistent with previous years:</p>	<p>1) Our kapahaka students will receive tuition from Matua Takari Reweti assisted by senior Otumoetai College students as part of their NCEA studies. Our intention is for our kapa haka group to participate in the regional kapa haka competitions. It is important for our school to have a face at these competitions.</p> <p>We were able to host Te Rā Rehia our Kāhui Ako</p>	<p>Our 2023 plan to enhance the Maori dimension in our school is in five parts and remains consistent with previous years:</p>

been provided the reading building blocks they were missing.

It is early days, however, a good number of teachers have noticed some excellent gains in 2022 made by students who struggled with their reading, as a result of being explicitly taught fundamental reading skills. The feedback has been encouraging and Structured Literacy is now a consistent programme in classes.

The reappointment of 4 Within School Reading Teachers for 2023 will allow a focus to be maintained on driving better reading outcomes in the school.

We now have a supported learning class at year 7 and 8 and these students receive extra help with their learning, their teachers being assisted by teacher aides and intervention staff. A focus here is to build up the confidence of these students to enable them to better engage with their learning.

Kapa Haka Festival in 2022 and this was a great showcase of talent in our Kāhui Ako and well received by the community.

2) Matua Takiri will work with staff on strengthening our culturally responsive pedagogy. Janita Neal has run Te reo lessons for staff on Monday afternoons and these have been well attended and enjoyed and appreciated by staff.

3) We have included student awards (ribbons) in Te Reo, Tikanga, bilingual: sports, academic and other awards with Maori values such as manakitanga.

4) We are looking at enhancing our Maori students' self efficacy, resilience and engagement in their learning through our poutama group. We also run a manakura leadership class as part of the Friday academy programmes.

5) As a school we will identify and closely monitor Maori students and their progress against the Learning Progressions in the New Zealand Curriculum.

Planning for next year:

Our school curriculum is defined by what occurs inside each classroom and for our school to move forward we need to undergo a transformation in what we do. This involves a fundamental shift in understanding resulting in a new way of thinking, feeling and behaving in response to significant information and experience which is altering our existing perceptions and understandings. Two important foci need to occur in our school:

1. **Our curriculum has to connect to the lives of our students in order to be meaningful.**
2. **Our students need to have a voice in the decisions about what they will learn and how they will learn it. (heutagogy)**

TO ACHIEVE THIS WE WILL:

1. Increasingly integrate our curriculum to best meet the needs of young adolescents. This begins with real life problems introduced as themes once a term across the whole school (eg. Sustainability or Human Rights). Students will discuss their concerns about the world and be involved in the development of themes for their class/themselves.
2. Increasingly develop student inquiry learning where students are actively engaged in their learning and given increasing opportunities for collaboration.
3. Recognise that students today are part of a world that is active, mobile and ever-changing and our role is to ensure each student develops to their full potential. This will require an entrepreneurial approach to how we do things.
4. Recognise that teachers, who are developing new curricula in their classrooms and seeking connections to provide their students with relevant learning experiences, cannot make this transformation overnight.
5. Transforming classroom learning can only be achieved by teachers working together to develop ways to allow for student voice, to integrate the curriculum and yet maintain a focus.
6. Focus on enabling teachers to develop the pedagogical skills to be effective. This requires teachers to use a teacher inquiry and knowledge-building cycle to promote valued student outcomes (pp 34-35 NZ Curriculum).
7. Seek ways to increase family and community involvement in student learning and to develop effective reporting to parents against national standards.
8. Seek ways to continue and enhance provision of a broad range of sporting, academic and cultural opportunities for all students.
9. We will proactively accommodate our young adolescent students' myriad of physical, emotional and social needs in every classroom.
10. We will actively seek ways for student collaboration and co-operation to become a bigger feature of their learning.
11. We will display the school vision and goals in prominent places in each classroom and throughout the school.
12. We will continue implementation of a personalised teacher professional development programme where mentoring and coaching are the predominant methods of learning.
13. We will review and develop strong systems and processes for quality assurance based on evidence gathered and personal portfolios of achievement for students and teachers.
14. We will ensure all teachers are aware of school expectations and develop the skills to carry out effective pedagogy / heutagogy based on those expectations.
15. Teaching teams will collaboratively refine the school curriculum in all 8 learning areas with an integrated framework and incorporating the values and key competencies.
16. All teachers and students will have access to and incorporate ICT in the day-to-day interactions with parents and wider community as well as accessing and manipulating information as a key part of their learning.

Focus:	Writing
Strategic aim:	For all students to be fully engaged in their learning and at least 85% achieving at or above curriculum expectation in writing.
Annual aim for 2022:	For 85% or more of our students including Māori and Pasifika to be achieving at or above expected curriculum level and to lift and accelerate the learning of students who entered the school below the expected curriculum level.
Baseline data February 2022:	The year 7 cohort saw 65% of the students enter our school at or above expected curriculum level. The year 8 cohort saw 72% of the students commencing year 8 at or above expected curriculum level.
Targets 2022:	85% of the Year 7 cohort are writing at or above the expected New Zealand Curriculum level at the end of the year which is the end of level 3 and working in early level 4 or above. 85% of the Year 8 cohort are writing at or above the expected New Zealand Curriculum at the end of the year which is mid level 4 and above.

Actions (what did we do?)	Outcomes (what happened?)	Reasons for the variance (why did it happen?)	Evaluation (where to next?)
<p>Unrelenting focus by all staff, students and parents on high levels of achievement</p> <p>Entrepreneurial approach to school organisation and culture</p> <p>Learning that is connected to the students' real world (21st century)</p> <p>e.g.: e-learning</p> <p>All students develop challenging goals to ensure progress</p> <p>All students being given frequent verbal and written feedback and feed forward on their learning and achievement</p> <p>Parents receive personalised communication regularly</p> <p>High expectations by the teacher of all students</p> <p>Effective learning in every classroom</p> <p>Regular, direct, purposeful instruction in all curriculum areas</p> <p>Priority given to writing skills within an integrated programme</p> <p>All students valued as individuals and actively involved in their learning and decision making</p> <p>All students have their culture and ethnicity recognised and valued</p> <p>Differentiated Professional Learning for teachers</p> <p>Teachers actively engaged in knowledge building</p> <p>Dedicated booster classes to supplement classroom learning for students below expectation in reading/writing</p> <p>We also have an unrelenting focus on the enhancement of teacher's pedagogical knowledge in the delivery of writing programmes that accelerates the learning of students.</p>	<p>At year end:</p> <p>Year 7: a total of 75% students were at or above expected curriculum level.</p> <p>Year 8: a total of 78% students were at expected curriculum level.</p> <p>Priority Learners:</p> <p>Year 7 Māori students: 57% were at expected curriculum level.</p> <p>Year 8 Māori students: 68% were at or above expected curriculum level.</p> <p>Teacher judgment for the year 8 Māori students overall, shows on entry in 2021 as year 7's 55% (51 students) were sitting at WB/B. In November 2022, on exit from the school as year 8's, this had decreased to 32% (31) students.</p>	<p>There is evidence that school writing results are improving. Much of this can be attributed to the uptake of the Writer's Toolbox throughout the kāhui ako.</p> <p>Gains are particularly evident in Maori students. There has been a 37% shift over the 2 years of students once below expectation, to at or above expectation.</p> <p>The intermediate is beginning to notice a strengthening of aspects of writing coming through at year 7, particularly with the improvement in students writing grammatically correct sentences.</p> <p>The structured approach to the teaching of writing, combined with opportunities for writers to collaborate in writing groups, has had an effect on outcomes.</p> <p>It is hoped this positive trend continues with a strengthening of knowledge of teaching skills as teachers continue to refine their practice.</p> <p>The writing rubric developed from the year 0-10 framework has been refined over the 2022 year and is simple for teachers to use and assess against.</p>	<p>This curriculum area continues to require a strong focus for those staff new on our school site or who have not been involved in the professional learning opportunities previous staff have experienced. We must ensure that we are consistent with delivery and continue to embed the learning teachers have received. Investing in the online Writer's Toolbox resource for teachers should also assist with upskilling newer teachers. Having had PLD in writing for an extended period of time it is important to ensure the gains from this work are maintained.</p> <p>Teachers are noticing an improvement in writing coming from the contributing schools. The college is also saying that the year 9 cohorts are better at writing than in prior years which is positive reinforcement of the direction we have taken writing. The recent writing corequisite trial at the college showed that writing in the school was substantially better than the national average which was extremely pleasing. Students have a better understanding of what a sentence is and how to show an understanding of the processes and criteria that makes a fluent and effective writer.</p> <p>In 2022, we continued to use a refined assessment rubric that has been developed from the year 0-10 writing framework developed by the Literacy Leaders (driven by the ASTs) of the kāhui ako. This rubric worked well and is now leveled against the curriculum..</p> <p>The Kahui ako has finished its PLD with the Writer's Toolbox.</p>

Planning for next year:

Please refer to the reading section above as most of the planned strategies are the same for writing. In addition, the school will continue to refine the writing rubric based on the year 0 - 10 Writing Platform developed by the Kāhui Ako ASTs and Literacy Leaders. We will continue to strengthen all aspects of teacher knowledge about the Write That Essay programme and ensure new teachers receive PID in this area using the AST and WST in school.

Focus: Mathematics

Strategic aim:

For all students to be fully engaged in their learning and at least 85% achieving at or above curriculum expectation in maths.

Annual aim for 2022:

For 85% or more of our students including Māori and Pasifika to be achieving at or above expected curriculum level and to lift and accelerate the learning of students who entered the school below the expected curriculum level.

Baseline data Feb 2022:

The year 7 cohort saw 74% of the students enter our school at or above expected curriculum level.
The year 8 cohort saw 75% of the students commencing year 8 at or above expected curriculum level.

Targets 2022:

85% of the Year 7 cohort are working at or above the expected New Zealand Curriculum level in maths at the end of the year which is the end of level 3 and working in early level 4 or above.
85% of the Year 8 cohort are working at or above the expected New Zealand Curriculum in maths at the end of the year which is mid level 4 and above.

Actions (what did we do?)	Outcomes (what happened?)	Reasons for the variance (why did it happen?)	Evaluation (where to next?)
<p>Unrelenting focus by all staff, students and parents on high levels of achievement</p> <p>Entrepreneurial approach to school organisation and culture</p> <p>Learning that is connected to the students' real world (21st century) e.g.: e-learning</p> <p>All students develop challenging goals to ensure progress</p> <p>All students being given frequent verbal and written feedback and feed forward on their learning and achievement</p> <p>Parents receive personalised communication regularly</p> <p>High expectations by the teacher of all students</p> <p>Effective learning in every classroom</p> <p>Regular, direct, purposeful instruction in all curriculum areas</p> <p>Priority given to numeracy skills within an integrated programme</p> <p>All students valued as individuals and actively involved in their learning and decision making</p> <p>All students have their culture and ethnicity recognised and valued</p> <p>Differentiated Professional Learning for teachers</p> <p>Teachers actively engaged in independent teacher inquiry and knowledge building</p> <p>Dedicated booster classes will supplement classroom learning for students below expectation in mathematics</p> <p>We also have an unrelenting focus on the enhancement of teacher's pedagogical knowledge in the delivery of maths programmes that accelerates the learning of Maori / Pasifika students. DMIC remains the cornerstone of classroom maths programmes.</p>	<p>At year end:</p> <p>Year 7: a total of 76% students were at or above expected curriculum level.</p> <p>Year 8: a total of 80% students were at expected curriculum level.</p> <p>Priority Learners:</p> <p>Year 7 Māori students: 59% were at expected curriculum level.</p> <p>Year 8 Māori students: 66% were at or above expected curriculum level.</p> <p>Teacher judgment for the year 8 Māori students overall, shows on entry in 2021 as year 7's 48% (44 students) were sitting at WB/B. In November 2022, on exit from the school as year 8's, this had decreased to 34% (33) students.</p>	<p>Results in 2022 have dipped slightly for maths from 2021 results. It is pleasing that given 3 years of Covid-19 disruptions, strong maths results have managed to be maintained.</p> <p>Generally, the results are similar to previous years showing maths learning is reasonably strong in the school. Acceleration of learning seems to occur at a greater level in the year 8 year than at year 7. This is not an issue when the learning journey of a student is viewed over two years. However, in 2023, year 7 teachers will be tasked with looking at the robustness of their programmes and whether changes need to be made to improve outcomes. This will be a focus..</p> <p>DMIC remains a big part of the way maths has been taught, however, there was an emphasis in 2022 on ensuring more direct acts of teaching were incorporated into programmes when students showed gaps in knowledge. The use of Mangahigh as a supplement to classroom teaching has continued to be well received by teachers and students alike. This will continue in 2023.</p> <p>The use of booster classes to lift and accelerate student learning also increased their self-efficacy and saw long term gains made for the target students.</p> <p>In 2022, the school benefited from an MST maths teacher being appointed to continue the booster programme. It is intended that in 2023, the MST teacher, who is now our WST for maths, will drive the intervention programme but also deliver PLD to teachers around DMIC. The school is also fortunate to have an AST dedicated to maths across the Kahui ako who will work with our WST and management to monitor and develop maths programmes in the school.</p> <p>In 2022 - we introduced a new scope and sequence</p>	<p>The results for 2022 are similar to those of previous year but are slightly down on 2021.</p> <p>What is clear is that maths teaching in the school will need to be monitored to ensure the strong maths learning continues in classes and in light of the curriculum refresh.</p> <p>While many students show a great deal of enthusiasm for mathematics with the DMIC approach, there are students at the high ability level and students at the low ability level who are less than enthusiastic about participating in the DMIC lessons. There needs to be a more balanced approach to teaching maths developed across the next few years.</p> <p>Observation of these lessons has shown students involvement and discussion in and around the learning of mathematics is generally good. Many students articulate that maths is enjoyable and look forward to this part of the day. The teachers involved in this have learnt a great deal about setting up a mathematical learning community with the students. However, many students articulate they also like to be explicitly taught and to practise maths.</p> <p>It is very important to re-engage some students in learning maths as many students arrive at the intermediate believing they are 'dumb' at maths. Starting the year with activities, fun mathematical challenges and lots of group work is a way to change that feeling that maths is a grind, and we are looking at ways this can be achieved.</p>

approach to maths teaching in the school. It is hoped that this will provide structure to year 7 and 8 programmes and also provide teachers with support around assessment and reporting on maths progress. Feedback on this programme is that it provides good coverage of mathematical concepts required to be taught.

We look forward to developing the OIS maths programmes across 2023 and focusing on maths as a priority subject.

Experts on staff will assist the AST and WST to provide PLD to teachers across the year. This will involve direction around the best approach and techniques to teaching particular aspects. We have excellent practitioners on staff and can also utilize college teachers in this space.

We will not lose sight of the benefits of the DMIC approach to maths teaching. This has empowered students in classrooms to take greater control of the learning and has increased their self-efficacy and willingness to be engaged in a non-threatening manner.

Planning for next year:

Most of the above for reading and writing but including continuing school wide implementation of Communities of Mathematical Inquiry as one form of mathematics delivery. However, developing a more balanced approach to teaching maths that includes explicit acts of teaching where appropriate. Using scope and sequence to cover the maths curriculum and new tracking and assessment tools. Upskilling teachers using inhouse experts. Further upskilling teachers around the use of Mangahigh.

Declaration:

This 2023 Charter was ratified by the Otumoetai Intermediate School Board of trustees at their meeting held:

23 February 2023



About the NELP and TES

The Statement of National Education and Learning Priorities (NELP) and the Tertiary Education Strategy (TES) set out the Government's priorities for education that will ensure the success and wellbeing of all learners. They are statutory documents issued under the Education and Training Act 2020 that direct government and education sector activities towards the actions that will make the biggest difference, and ensuring that we are able to strengthen the education system to deliver successful outcomes for all learners/ākongā.

The NELP and TES priorities will help create education environments that are learner centred, and where more of our learners, and especially more of our Māori and Pacific learners, are successful. Therefore, they encourage all places of learning to focus on;

- ensuring that they are safe and inclusive and free from racism, discrimination, and bullying
- strengthening the quality of teaching our learners receive to giving our learners the skills they need to succeed in education, work and life
- collaborating more with whānau, employers, industry and communities
- taking account of learners' needs, identities, languages and cultures in their practice; and
- incorporating te reo Māori and tikanga Māori into everyday activities.

Independent Auditor's Report

To the Readers of Otumoetai Intermediate School's Financial Statements

For the Year Ended 31 December 2022

The Auditor-General is the auditor of Otumoetai Intermediate School (the School). The Auditor-General has appointed me, Richard Dey, using the staff and resources of William Buck Audit (NZ) Limited, to carry out the audit of the financial statements of the School on his behalf.

Opinion

We have audited the financial statements of the School on pages 2 to 23, that comprise the statement of financial position as at 31 December 2022, the statement of comprehensive revenue and expense, statement of changes in net assets/equity and statement of cash flows for the year ended on that date, and the notes to the financial statements that include accounting policies and other explanatory information.

In our opinion the financial statements of the School:

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

Our audit was completed on 31 May 2023. This is the date at which our opinion is expressed.

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

Basis for our opinion

We carried out our audit in accordance with the Auditor-General's Auditing Standards, which incorporate the Professional and Ethical Standards and the International Standards on Auditing (New Zealand) issued by the New Zealand Auditing and Assurance Standards Board.

Our responsibilities under those standards are further described in the Responsibilities of the auditor section of our report. 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 is responsible for such internal control as it determines is necessary to enable it to prepare financial statements that are free from material misstatement, whether due to fraud or error.

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

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

Responsibilities of the auditor for the audit of the financial statements

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

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

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

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

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

- We identify and assess the risks of material misstatement of the financial statements, whether due to fraud or error, design and perform audit procedures responsive to those risks, and obtain audit evidence that is sufficient and appropriate to provide a basis for our opinion. The risk of not detecting a material misstatement resulting from fraud is higher than for one resulting from error, as fraud may involve collusion, forgery, intentional omissions, misrepresentations, or the override of internal control.
- We obtain an understanding of internal control relevant to the audit in order to design audit procedures that are appropriate in the circumstances, but not for the purpose of expressing an opinion on the effectiveness of the School's internal control.
- We evaluate the appropriateness of accounting policies used and the reasonableness of accounting estimates and related disclosures made by the Board.
- We conclude on the appropriateness of the use of the going concern basis of accounting by the Board and, based on the audit evidence obtained, whether a material uncertainty exists related to events or conditions that may cast significant doubt on the School's ability to continue as a going concern. If we conclude that a material uncertainty exists, we are required to draw attention in our auditor's report to

the related disclosures in the financial statements or, if such disclosures are inadequate, to modify our opinion. Our conclusions are based on the audit evidence obtained up to the date of our auditor's report. However, future events or conditions may cause the School to cease to continue as a going concern.

- We evaluate the overall presentation, structure and content of the financial statements, including the disclosures, and whether the financial statements represent the underlying transactions and events in a manner that achieves fair presentation.
- We assess the risk of material misstatement arising from the school payroll system, which may still contain errors. As a result, we carried out procedures to minimise the risk of material errors arising from the system that, in our judgement, would likely influence readers' overall understanding of the financial statements.

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

Our responsibilities arises from the Public Audit Act 2001.

Other information

The Board of Trustees is responsible for the other information. The other information comprises the information included in the annual report being the Kiwisport Report, Members of the Board of Trustees and Analyses 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.



Richard Dey
William Buck Audit (NZ) Limited
On behalf of the Auditor-General
Tauranga, New Zealand