
Choice and Affordability Fund

Work Plan 2022–2025

**The Association of Independent Schools of South
Australia**

December 2023

Choice and Affordability Fund – Work Plan 2022–2025

The Association of Independent Schools of South Australia

Summary of Work Plan 2022–2025

This work plan details the commitment of the Association of Independent Schools of South Australia (AISSA) to meeting the objectives of the Choice and Affordability Fund (CAF) to address specific challenges in the non-government school sector for the coming quadrennium 2022 - 2025.

Central to this work plan are the national priorities to facilitate initiatives that foster parental access to schooling of their choice and means; support schools in circumstances where they may be impacted by funding changes, social or environmental challenges; and strengthen educational outcomes and maximise the wellbeing of students, especially those experiencing educational disadvantage. The AISSA believes that continuity, within a paradigm of responsiveness, will best support the meeting of this important agenda. It is this long-term approach that will best set up schools to meet the needs of their students and families.

Implementation of the proposed work plan activity is totally contingent on CAF funding. The activity outlined in this document will build on the 2020-2021 work plan, to provide initiatives and levels of support not currently available to the sector. Projects and activities include funds distributed directly to schools as grants, in addition to centralised programs to best support schools.

Across the five priorities careful consideration has been given to project and initiative design, intentionally supporting schools in regional areas, in addition to working with Approved Authorities and other systemic and non-systemic Independent schools. Additionally, this work plan builds on and takes into account feedback from the Australian Government on the AISSA's previous work plan and annual report, including a documented risk management approach and stakeholder engagement strategy.

The risk management table outlines the AISSA response, should a potential issue arise, for example, a critical incident that prevented the postponement of an activity or grant process. The elements within the mitigation responses are designed to maximise engagement and minimise potential barriers to program access and delivery.

The engagement strategy carefully considers how successful connections with a range of critical stakeholders – from schools to cross sector and external agencies – will take place over the next four years. Central to this is that communication about this work plan has become a standing item within the scheduled Principals', and other stakeholder, meetings held regularly in each term. This has been intentionally implemented to both enable clarity about plans, priorities and means of access for schools, and to receive feedback and commentary, as required. Processes have also been implemented that seek feedback from schools with distinctive challenges as they transition to the Direct Measure of Income (DMI) funding arrangements. The intent is that all Independent schools across South Australia are well versed in the opportunities and support that the CAF provides.

The design of the *Choice and Affordability* response seeks to build on the success of work commenced in 2020-2021, that saw schools equipped with knowledge and skills about business development planning, to enhance affordability for parents. The demonstrated value of this initiative will see the program continue over the coming four years, with all non-Lutheran schools across the sector invited to apply. A key outcome will be that schools are able to build on their strategic business implementation and deploy efficiencies within business practices. An annual evaluative analysis and sector consultation, undertaken by the AISSA, will support the directions of this initiative in subsequent years, so that effective responses to emerging needs and priorities are implemented within the Business Development Program approach. Once again, a specific strand of program activity will be designed for Lutheran schools, through funding provided directly to the Approved Authority – Lutheran Education South Australia, Northern Territory and Western Australia (LESNW). This priority will be complemented with a range of professional learning support for all Independent schools, including data analysis, policy support and strategic advice.

Grant funding for *Transition Assistance* to the Direct Measure of Income (DMI) is essential, as a number of South Australian Independent schools, as identified by the Australian Government, will face negative funding impacts. Over 80% of these schools provide a significant service to students from regional areas through the provision of Boarding services, a costly and intensive endeavour that has been further impacted by the closure of international borders because of the COVID-19 pandemic. Schools identified in this category will have the opportunity to apply for grants to assist in the streamlining of business practices in support of enhanced and adaptive business models. Additionally, over the course of this quadrennium, Transition Assistance grants will support other schools impacted negatively by the DMI to also refine business practices and models. Both elements of these processes are underpinned by clear eligibility and application criteria, with the AISSA cognisant that additional schools may meet the eligibility criteria for support once it is established. Additionally, updated DMI values may impact on the numbers of schools supported under this initiative over the period to 2029.

Consistent with, and so as to deepen practices established in the previous work plan, four regional Lutheran schools will continue to be supported by funding provided to their approved authority. The LESNW will have the discretion to determine the allocation methodology for expending these funds as grants to the four schools. This process is formalised through an annual agreement and acquittal process between the AISSA and the Approved Authority.

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Special Circumstances Funding will be available over 2022 – 2025, to support action in response to emerging priority areas, or natural disasters such as drought and bushfire, which therefore require short-term emergency assistance. In line with this priority, guidance and an application process for schools requiring short term emergency assistance have been developed, including criteria for access. Schools will continue to be advised of the availability of this funding. An annual amount has been provisioned for the entirety of the quadrennium, with the intention that it operate as a draw down facility.

The South Australian Independent sector is characterised by 70% of schools with a DMI score of less than 100. This sees a significant proportion of schools across both metropolitan and regional areas from lower socio-economic areas. The addressing of educational disadvantage is an absolute imperative across the state. It is critical that any approach taken embraces a contemporary context and therefore, the AISSA will work with the Independent sector to *Strengthen outcomes for schools and educationally disadvantaged schools and students* through two initiatives: Strengthening School Leadership, Excellence and Innovation; and Building Teacher Efficacy.

A robust leadership strand will be implemented that works with individual leadership teams to contribute to the achievement of whole-of-school educational priorities. Key elements include supporting and enhancing the skills of distributed leadership teams, and an innovation lens that equips leadership teams to explore learning success within contemporary organising frameworks, competencies and technologies. Teachers' understandings will be deepened through professional learning that builds understanding of evidence-based approaches to amplify student learning and address educational disadvantage.

A range of delivery modes, together with the provision of ongoing advice and implementation support will facilitate participation across the sector. Building on the work of the previous CAF work plan, a staff member will continue to be employed part-time to build the capacity of Vocational and Educational Training (VET) leaders in schools to build successful industry partnership opportunities. Additionally, during 2022 and 2023, school support officers will continue to be supported to develop their capacity to support student learning.

Over the coming quadrennium, Independent schools will be supported to critically navigate the breadth of wellbeing resources and advice to effect contextually appropriate approaches and programs. Building leadership capacity to drive implementation will be a key focus, so that schools are able to critically examine, implement, and evaluate approaches and programs that will best meet the needs of their communities. Examples of exemplary practice will be developed and the AISSA website will provide a repository for contemporary advice and resources.

Initiative design over this period for each of the five national priorities has been shaped and informed by the Choice and Affordability Fund Guidelines 2020-2029. The AISSA is committed to implementation of these funds to support the achievement of the national objectives established to support the accessibility of non-government schools for parents, the strengthening of outcomes for schools, provide transition assistance and the building of safe and supportive environments for all.

2023 Workplan Update

National Priority B

Budget Re-Allocation between Transition Assistance NAAF and Transition Assistance Other activities 2023-2025

The AISSA 2022-2025 workplan identifies that that additional schools may meet the eligibility criteria for Transition Assistance – Other over the workplan based on eligibility criteria and that updated DMI values may also impact on the numbers of schools supported within each program year. Subsequently, the necessity for a small increase in the Transition Assistance-Other distributed budget line has been identified for the years 2023, 2024 and 2025, an increase is outside the 20% limitation under the Guidelines. The higher than anticipated indexation rate for 2023 and estimated indexation rate for 2024 has enabled the additional funding to be drawn from the Transition Assistance – NAAF activity without any negative implications for supported NAAF schools. This was deemed a more prudent use of government funding than redistribution from another Priority. No changes have been made to the Transition Assistance – Regional as per the Australian Government established arrangements.

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Overarching Risk Management

The AISSA plans to address program management risk as a single work program, to ensure that the CAF Program can be delivered efficiently, effectively and with efficacy.

| Risk category | Identified risks | Management |
|--|---|---|
| Stakeholder | <p>Program design fails to meet stakeholder need</p> <p>Lack of stakeholder engagement</p> <p>Lack of access to program information</p> | <p>Stakeholder engagement plan documented</p> <p>A range of organisational communication structures and approaches to service delivery are in place, including formal agenda briefings, electronic newsletters, website updates and stakeholder meeting opportunities</p> |
| External catastrophic event / critical incident | <p>The AISSA and/or schools are involved in a critical incident that disrupts normal operational capability</p> <p>The event leads to postponement of activity or the issuing of grants</p> <p>School leaders and staff are unable to access AISSA services</p> <p>Schools face impediments in participating in CAF Priority activity</p> | <p>AISSA Business Continuity Plan and suite of policies and procedures are in place</p> <p>Remote and in-situ processes and procedures have been established and implemented that enable continuation of:</p> <ul style="list-style-type: none"> - the provision of timely advice responsiveness to schools' needs during complex times - ability to work with schools using online and remote modes <p>A range of feedback mechanisms will facilitate timely organisational responses to schools' identified needs</p> |
| Organizational | <p>Judicious use of funds and validity of program implementation</p> | <p>Overarching governance oversight provided through the AISSA Board</p> <p>Effective internal and external financial procedures and auditing processes</p> <p>Regulated by the Australian Charities and Not-for-profits Commission (ACNC)</p> <p>Established stakeholder feedback mechanisms</p> |
| Technical | <p>Increased threat of cyber attack</p> <p>Lack of access by regional and remote schools</p> | <p>Comprehensive organisational security processes and policies exist</p> <p>Proven ability to work with regional and remote schools using online and remote modes</p> |
| Project Management | <p>Lack of continuity</p> | <p>Proven stability and expertise of AISSA staff in project management and management of Australian Government funds</p> <p>Australian Government assurance that broad strategies will continue for two four-year periods</p> |

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Stakeholder Engagement Plan

Across the forthcoming quadrennium, the Stakeholder Engagement Plan is responsive four broad audiences: Principals; leadership teams and Teachers; cross sector colleagues, and other external stakeholders.

| Stakeholder & Interest/Impact | Engagement Strategy |
|---|---|
| <p>Principals</p> <p>So that</p> <ul style="list-style-type: none"> - the design within each priority meets the needs of schools, students and stakeholders - leaders are kept abreast of planned and future initiatives to help strengthen leadership capability and build teacher efficacy - modes of delivery enable equitable access for schools. | <p>The AISSA will ensure</p> <p>CAF updates and educational reports are formally documented and shared with school Principals during scheduled <i>Heads of Schools</i> meetings, diarised for each term.</p> <p>Meeting modes include face-to-face and video conference meetings to maximise participation.</p> <p>School principals are formally consulted and invited to provide feedback about annual program design, via electronic means, in addition to a specific focus group opportunity, to ensure best-fit initiatives are designed.</p> <p>The AISSA electronic <i>Bulletin</i> publication provides regular updates to schools about related CAF activity and updates are housed on the AISSA website.</p> |
| <p>School Leadership Teams and Teachers</p> <p>So that</p> <ul style="list-style-type: none"> - Leadership Teams within schools are kept abreast of planned and future initiatives and are supported to critically reflect on current practice - communities of practice are in place across the sector - best-practice initiatives and resources are shared - modes of delivery enable equitable access for schools. | <p>The AISSA will ensure</p> <p>Reference Group meetings are scheduled regularly each term for the following key sector stakeholder groups: Business Managers, Curriculum Reference Groups, VET Leaders in schools.</p> <p>The AISSA website is an integral repository for information, resources and artefacts.</p> <p>Meeting modes include face-to-face and video conference meetings to maximise participation.</p> |
| <p>Cross-sector Colleagues</p> <p>So that</p> <ul style="list-style-type: none"> - initiatives build on state-wide priorities - senior state education leaders are kept abreast of planned and future initiatives - potential partnership opportunities can be maximised - connections with professional associations are maintained and strengthened. | <p>The AISSA will ensure</p> <p>Formalised cross-sector Senior Officer and Sector Heads meetings provide the conduit for the sharing of educational initiatives and resources, for the benefit of all South Australian students.</p> <p>Education initiatives are shared with professional associations biennially at formalised meetings.</p> |
| <p>Other External Stakeholders</p> <p>So that</p> <ul style="list-style-type: none"> - other external stakeholders, such as recognised authorities, parents and the wider community are kept abreast of planned and future initiatives - open and transparent processes are in place. | <p>The AISSA will ensure</p> <p>Standing groups, such as those representing sector approved authorities, are scheduled regularly and table CAF priority information and updates.</p> <p>The AISSA website is an integral repository for information, resources and artefacts, including publication of this work plan and annual reports.</p> |

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Budget for 2022–2025

| Activities/Initiatives | Expenditure type | 2022 | 2023 | 2024 | 2025 |
|---|-----------------------------|--------------------|--------------------|--------------------|--------------------|
| <u>A – Choice and Affordability</u> | | | | | |
| Business Development Plans | Centralised | \$95,869 | \$97,996 | \$100,656 | \$103,330 |
| | Distributed | \$20,000 | \$20,000 | \$20,000 | \$20,000 |
| Total for Priority A | Centralised | \$95,869 | \$97,996 | \$100,656 | \$103,330 |
| | Distributed | \$20,000 | \$20,000 | \$20,000 | \$20,000 |
| <u>B – Transition Assistance</u> | | | | | |
| Transition Assistance – NAAF Schools | Centralised | \$30,794 | \$31,410 | \$32,039 | \$32,679 |
| | Distributed | \$441,024 | \$800,347 | \$953,899 | \$1,057,540 |
| Transition Assistance – Other Schools | Centralised | \$25,803 | \$26,319 | \$26,845 | \$27,382 |
| | Distributed | \$115,000 | \$168,104 | \$168,104 | \$168,104 |
| Regional Transition Assistance | Centralised | \$3,226 | \$3,290 | \$3,356 | \$3,423 |
| | Distributed | \$148,228 | \$152,676 | \$157,256 | \$161,974 |
| Total for Priority B | Centralised | \$59,823 | \$61,019 | \$62,240 | \$63,484 |
| | Distributed | \$704,252 | \$1,121,127 | \$1,279,259 | \$1,387,638 |
| <u>C – Special Circumstances Funding</u> | | | | | |
| Special Circumstances Funding | Centralised | \$5,928 | \$6,047 | \$6,167 | \$6,291 |
| | Distributed | \$500,000 | \$500,000 | \$500,000 | \$500,000 |
| Total for Priority C | Centralised | \$5,928 | \$6,047 | \$6,167 | \$6,291 |
| | Distributed | \$500,000 | \$500,000 | \$500,000 | \$500,000 |
| <u>D – Strengthening outcomes for schools and educationally disadvantaged schools and students</u> | | | | | |
| Strengthening School Leadership, Excellence and Innovation | Centralised | \$621,305 | \$633,732 | \$646,406 | \$659,334 |
| | Distributed | \$0 | \$0 | \$0 | \$0 |
| Building Teacher Efficacy | Centralised | \$418,087 | \$426,450 | \$434,980 | \$443,677 |
| | Distributed | \$0 | \$0 | \$0 | \$0 |
| Total for Priority D | Centralised | \$1,039,392 | \$1,060,182 | \$1,081,386 | \$1,103,011 |
| | Distributed | \$0 | \$0 | \$0 | \$0 |
| <u>E – Student wellbeing and support</u> | | | | | |
| Effective Whole School Approaches To Student Wellbeing | Centralised | \$226,306 | \$230,832 | \$235,448 | \$240,158 |
| | Distributed | \$0 | \$0 | \$0 | \$0 |
| Total for Priority E | Centralised | \$226,306 | \$230,832 | \$235,448 | \$240,158 |
| | Distributed | \$0 | \$0 | \$0 | \$0 |
| | Administrative costs | \$53,520 | \$55,125 | \$56,779 | \$58,483 |
| | Total expenditure | \$2,705,090 | \$3,152,327 | \$3,341,935 | \$3,482,395 |
| | Deferred funding | \$0 | \$0 | \$0 | \$0 |

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Expenditure Profile for 2022–2029

| | 2022 | 2023 | 2024 | 2025 | 2026* | 2027* | 2028* | 2029* |
|---|--------------------|--------------------|--------------------|--------------------|-------------|-------------|-------------|-------------|
| NGRB’s total estimated funding allocation as advised by the department | \$2,675,994 | \$2,756,274 | \$2,838,962 | \$2,924,132 | \$3,011,856 | \$3,102,210 | \$3,195,278 | \$3,291,134 |
| NGRB’s estimated Regional Transition Assistance funding allocation as advised by the department | \$148,228 | \$152,676 | \$157,256 | \$161,974 | \$166,834 | \$171,838 | \$176,994 | \$182,302 |
| Accrued deferred funding from 2020 and 2021 to be carried forward to 2022 | \$1,729,936 | | | | | | | |
| Accrued interest earned on funds held in 2020 and 2021 to be carried forward to 2022 | \$3,580 | | | | | | | |
| NGRB’s planned expenditure for the relevant year | \$2,705,090 | \$3,152,327 | \$3,341,935 | \$3,482,395 | \$3,186,856 | \$3,152,210 | \$3,217,409 | \$3,291,134 |
| NGRB’s planned regional transition assistance expenditure for the relevant year | \$148,228 | \$152,676 | \$157,256 | \$161,974 | \$166,834 | \$171,838 | \$176,994 | \$182,302 |
| NGRB’s planned deferred funding for the relevant year to be spent in a future year | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 |
| Accrued deferred funding from the relevant year and previous years to be spent in a future year | \$1,704,420 | \$1,308,367 | \$805,394 | \$247,131 | \$72,131 | \$22,131 | \$0 | |

* Funding over 2026 to 2029 is indicative and will be finalised through 2026-2029 work plans to be settled in 2025.

Rationale for deferred funding

Approximately \$1,729,936 of 2020 and 2021 funds was deferred in order to meet the needs of South Australian Independent schools in relation to the following two priorities:

- Transition Assistance – to support schools successfully transition to the Direct Measure of Income funding arrangements, with the greatest need occurring from 2023 to 2025; and
- Special Circumstance Funding – setting aside funds to ensure that there is capacity to respond to unforeseen events such as bushfire, drought and other special circumstances.

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| | |
|----------------------------|---|
| Activity/Initiative | Name: Business Development |
| Priority | A – Choice and Affordability of Schools |

Description

In recognition of the economic challenges faced by South Australia as a result of factors such as the closure of large manufacturing industries, drought, bushfires and COVID-19, the AISSA funded under the 2020-2021 work plan a business development program. The aim of the program was to assist schools in progressing business development plans to enable them to streamline business practices, in order to enhance choice and affordability for families. This program has been well received by participating schools and analysis by the AISSA has identified demonstrable value from the program in enhancing choice and affordability for families. The AISSA intends to fund a similar program under the Choice and Affordability Fund over the coming quadrennium.

South Australia continues to face a range of economic challenges, which place cost pressures on many school communities. The COVID-19 pandemic has demonstrated the need for schools to be able to pivot operations and respond quickly to the changing needs of school communities along with the wider community. COVID-19 has also placed a significant cost burden on many schools including through increased operational costs, for example, in response to maintaining COVID safe environments, and the increased need for fee remissions, with consequent impacts and pressures on choice and affordability.

The 2022-2025 Business Development Program will complement and build on the program funded under the previous work plan. The continuation of the Business Development Program under this work plan both enables continuity in program support in an identified area of need, and deeper more strategic implementation by schools. Funding will again be used to engage external professional expertise to support participating schools to identify changes to business practices that enable schools to maintain operations without a significant cost burden placed on families. The AISSA will undertake the engagement process of the professional expertise in order to facilitate economies of scale and ensure the expertise matches the program's intent.

Meeting the eligibility criteria for the 2020-2021 program required eligible schools in their applications to provide a written submission of the challenges faced by the school, including external contributing factors, and the provision of a range of demographic and financial data to assist the AISSA in its determination of eligibility for the program. Subject to a formal assessment of the 2020-2021 program at the conclusion of 2021, it is the AISSA's expectation that this criteria will form the basis of the criteria for the program over the 2022-2025 work plan.

The consultancy work will be undertaken in each of the years 2022 - 2025. The Business Development Program will be responsive to the needs of schools, particularly with regard to the realities of living with COVID. This necessitates that the program retains a degree of flexibility over the quadrennium in terms of the number of schools targeted and the type/s of expertise which is engaged. An analysis of the program will be conducted at the end of each of year which will further focus the strategic directions of the following year's program.

Recognising the specific governance arrangements in the Lutheran school system a separate strand of the program will again be run in the Lutheran school sector with funding provided directly to the Approved Authority – Lutheran Education South Australia, Northern Territory and Western Australia (LESNW). Centralised expenditure will be used to develop an agreement between the AISSA and LESNW.

Concurrently, centralised funding will be used to provide a range of professional support schools which will assist in meeting the Choice and Affordability priority. This includes, but is not limited to data analysis, policy support and strategic advice. Professional expertise will again be provided in the form of specific professional learning to support school leaders and school Boards to strategically navigate what are increasingly challenging times. Centralised expenditure will also be used to manage the application and acquittal process along with payment processing.

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Eligible schools

All South Australian Independent schools will be able to apply for support subject to meeting the specified criteria.

Timeframes

The Business Development program offered in each of the years of the quadrennium (2022 – 2025).

Outcomes

| Objectives/expected outcomes | Indicators of success |
|---|--|
| <ul style="list-style-type: none">Schools will be supported to implement business development plans to enhance long-term financial stability and maintain choice and affordability for South Australian families.School Boards and leaders will be supported to identify key strategic directions which will enhance strategic planning. | <ul style="list-style-type: none">A minimum of five schools are supported each year.Applications are assessed for approval and schools notified of the outcome within three weeks of closure of the application process.80% of schools which receive support under the program report success in developing a business plan which will meet the long-term financial needs of their school and are able to identify key strategic directions which will enhance the strategic directions of the school. |

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| | |
|----------------------------|--|
| Activity/Initiative | Transition Assistance |
| Priority | B – Transition Assistance – NAAF Schools |

Description

The transition to the Direct Measure of Income (DMI) will have a significant negative funding impact on a number of South Australian Independent schools.

Six schools have been identified by the Australian Government that would have been eligible for assistance under the National Adjustment Assistance Fund (NAAF) for the period 2022- 2028, with a further one school eligible in 2028. Significantly, five of the six NAAF schools are boarding schools which provide a significant and critical service to regional communities. The provision of boarding services is a high cost and intensive operation. The six schools, along with other schools in the Independent school sector, have further been affected by the closure of international borders which has both reduced international student intakes and increased costs for schools in caring for international students who have been unable to return home. The AISSA is aware that full fee paying overseas students are not eligible for recurrent funding but provides this information to assist the Australian Government in understanding the full context within which these schools operate.

Transition assistance will be provided to the six identified schools over the period of the 2022-2025 quadrennium to support the affected schools move to new sustainable business operations in light of the significant reduction in government recurrent funding. Using centralised expenditure, an application process will be developed, along with a fair and equitable formula for grant distribution and a transparent assessment process. Analysis and planning have been undertaken under the previous workplan in regard to developing criteria for access to the 2022-25 transition program with initial criteria expected to incorporate both an increase in DMI and an actual loss in Australian Government recurrent funding over the quadrennium along with a rationale as to why support is needed. Finalisation of the criteria for the first year of the quadrennium will be informed by an analysis of the 2021 Australian Government Q4 FET and the final transition starting points. Applications will be sought from schools, in early Term 1 of each year, with grant amounts determined each year, having regard to the eligibility criteria and in the context of the needs of individual schools. An assessment of the criteria will be undertaken at the end of each year to ensure that the criteria remain fit for purpose. The transition assistance will be provided for use by eligible schools to assist in undertaking a systematic analysis to assist in streamlining business practices and supporting schools to counter cost pressures which may result in higher fees.

Concurrently, centralised expenditure will be used to provide professional expertise to support schools in their business operations and therefore reduce costs, and provide efficiencies in managing the program and processing of grant payments.

Eligible schools

Negative growth NAAF schools will be eligible for transition assistance.

Timeframes

Transition assistance will be provided in each of the years of the quadrennium (2022 – 2025).

Outcomes

| Objectives/expected outcomes | Indicators of success |
|---|---|
| <ul style="list-style-type: none"> Eligible schools will be supported to adapt current business models to enable them to transition to the DMI funding arrangements by 2029. | <ul style="list-style-type: none"> Finalisation of eligibility criteria. Development of equitable and fair formula for distributing direct grants to eligible schools. Grant funding to be distributed within three weeks of the return of application forms. An acquittal process is undertaken at the end of each of the funded years. Schools meeting the eligibility criteria for assistance are being supported to transition to the Direct Measure of Income funding arrangements by 2029. Schools report success in identifying measures that will enable them to transition to the Direct Measure of Income funding arrangements by 2029. |

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| | |
|----------------------------|---|
| Activity/Initiative | Transition Assistance |
| Priority | B – Transition Assistance – Other Schools |

Description

In addition to the identified NAAF schools the transition to the Direct Measure of Income (DMI) will have a significant negative funding impact on a number of other South Australian Independent schools. Transition assistance will be provided to eligible schools over the period of the 2022-2025 quadrennium. As per the previous activity, using centralised expenditure, an application process will be finalised in early 2022 along with a fair and equitable formula for grant distribution. Analysis and planning have been undertaken throughout the 2021-2022 workplan in regard to developing criteria for access to the 2022-25 transition program with criteria expected to focus on loss in Australian Government recurrent funding in real terms over the quadrennium along with a rationale as to why support is needed. Finalisation of the criteria for the first year of the quadrennium will be informed by an analysis of the 2021 Australian Government Q4 FET and the final transition starting points. Applications will be sought from schools in early Term 1 of each year with actual grant amounts determined annually, having regard to the eligibility criteria in the context of the needs of individual schools. The transition assistance will be provided for use by eligible schools to assist in streamlining business practices and supporting schools to counter cost pressures which may result in higher fees.

Transition assistance will be provided in the form of smaller grants to no and low-growth schools, including the school identified as eligible for assistance under NAAF in 2028, to enable them to engage specialist services to assist in assessing how business practices may be streamlined, therefore reducing cost pressures. and successfully transitioning to the DMI methodology. This activity builds on the successful transition assistance activity in the previous work plan.

The AISSA is cognisant that additional schools may meet the eligibility criteria for support once it is established and that updated DMI values may impact on the numbers of schools supported under this initiative over the period to 2029.

Concurrently, centralised expenditure will be used to provide professional expertise to support schools in their business operations and therefore reduce costs, along with managing and processing the grant payments.

Eligible schools

Negative, no, and low growth schools will be eligible for transition assistance.

Timeframes

Transition assistance will be provided in each of the years of the quadrennium (2022 – 2025).

Outcomes

| Objectives/expected outcomes | Indicators of success |
|---|---|
| <ul style="list-style-type: none"> Eligible schools will be supported to adapt current business models to enable them to transition to the DMI funding arrangements by 2029. | <ul style="list-style-type: none"> Finalisation of eligibility criteria. Development of equitable and fair formula for distributing direct grants to eligible schools. Grant funding to be distributed within three weeks of the return of application forms. An acquittal process is undertaken at the end of each of the funded years. Schools meeting the eligibility criteria for assistance are being supported to transition to the Direct Measure of Income funding arrangements by 2029. Schools report success in identifying measures that will enable them to transition to the Direct Measure of Income funding arrangements by 2029. |

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| | |
|----------------------------|---------------------------------------|
| Activity/Initiative | Regional Transition Assistance |
| Priority | B – Transition Assistance |

Description

Four regional schools have been identified by the Australian Government as eligible for regional transition assistance, all of which sit under one Approved System Authority. Consistent with the 2020-2021 work plan, it has been determined that in light of the quantum of funding and the unique circumstances of each school, funding for 2022-2025 quadrennium will be processed and paid by the AISSA to the Approved Authority for onward payment to each school. The Approved Authority will be able to determine the allocation for each eligible school, as per the agreed national criteria, with the funding fully expended in grants to the four schools. The AISSA will distribute the entire regional transition assistance allocation as identified by the Australian Government.

Centralised expenditure will be used to progress an annual formal agreement between the AISSA and the Approved Authority, process the grant to the Approved Authority, and undertake an annual accountability process. Given the potential for there to be changes in schools over the quadrennium an annual agreement is deemed appropriate. The annual accountability process will be implemented by the AISSA to ensure that funds are used in accordance with the Australian Government requirements. The nationally agreed criteria will continue to be used as a threshold for eligibility.

Eligible schools

Regional transition assistance funding will be provided to eligible schools as identified by the Australian Government.

Timeframes

Regional transition assistance will be provided to eligible schools across the entirety of the quadrennium (2022 – 2025).

Outcomes

| Objectives/expected outcomes | Indicators of success |
|--|---|
| <ul style="list-style-type: none"> Eligible regional schools will receive direct transition assistance grants to support their transition to the DMI. | <ul style="list-style-type: none"> A formal agreement will be signed between AISSA and the Approved Authority for each participating school in each of the years 2022, 2023, 2024 and 2025. An acquittal for the use of funds will be provided by the Approved Authority. Funding will be processed and paid by the AISSA in a timely matter and no later than within three weeks upon the return of the signed agreement and any outstanding acquittal documentation. |

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| Activity/Initiative | Special Circumstances Funding |
| Priority | C – Special Circumstances Funding |

Description

The AISSA has provisioned \$2,000,000 over the 2022-2025 quadrennium (\$500,000 for each of the years 2022, 2023, 2024 and 2025) for the purposes of providing funding for schools which meet the Special Circumstances funding criteria as for short term emergency assistance, as outlined in the Choice and Affordability Guidelines, and to meet the requirement to provide Special Circumstances funding to schools in response to priority areas or natural disaster, including drought and bushfire, through establishing specific grant programs as required. Special Circumstances funding will only be provided on the basis of need and therefore may not be expended in every year.

The AISSA has developed Guidance and an Application Process for the Special Circumstances funding. Criteria for access is as follows:

- i. Unexpected - Could not have been reasonably foreseen.
- ii. Causing severe financial difficulty - Where a school faces a real prospect of having to cease a large part of its educational activities or significantly lower its educational services.
- iii. Short term - Schools should be able to overcome their financial difficulty and resume operations and must provide a five-year business and recovery plan.
- iv. A special need - Schools have exhausted all other options to remedy the financial situation of the school.

On receipt of an application, the AISSA will assess individual applications in accordance with the criteria identified above.

The AISSA will also provide Special Circumstances funding to schools in response to priority areas or natural disaster, including drought and bushfire, through establishing specific grant programs as required. The AISSA will develop a grant program specific to the needs of the particular priority area or natural disaster.

Eligible schools

All schools will be eligible for special circumstances funding subject to meeting the criteria.

Timeframes

Special circumstances funding will be provided to eligible schools across the entirety of the quadrennium (2022 – 2025).

Outcomes

| Objectives/expected outcomes | Indicators of success |
|--|--|
| <ul style="list-style-type: none"> • Schools which apply and are eligible for special circumstances funding are supported to continue operations and remain financially viable. | <ul style="list-style-type: none"> • Applications are assessed for eligibility within two weeks of the application being received. • Grants are processed within two weeks of an application being approved. • Schools which receive funding meet all accountability processes. |
| <ul style="list-style-type: none"> • Schools which receive funding in response to an identified priority or natural disaster are supported to continue operations. | <ul style="list-style-type: none"> • Special circumstances grant programs are established in a timely manner. • Applications are assessed for eligibility within two weeks of the application being received. • Grants are processed within two weeks of an application being approved. • Schools which receive funding meet all accountability processes. |

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| Activity/Initiative | Strengthening School Leadership, Excellence and Innovation & Building Teacher Efficacy |
| Priority | D – Strengthening outcomes for schools and educationally disadvantaged schools and students |

Description

During this quadrennium, the addressing of educational disadvantage, including students with disability and diverse needs, encompasses a contemporary context and is underpinned by the equitable preparation of all students for ethical participation in a global context and where future working lives will be across a range of occupations including those that may not currently exist.

Schools are uniquely positioned to develop the required competencies and dispositions in students. However, as outlined earlier, the South Australian Independent sector is characterised by 70% of schools with a DMI score of less than 100, indicating a significant proportion of schools are from lower socio-economic communities. Educational disadvantage is evidenced across the state in both regional and metropolitan areas.

An ongoing challenge for Independent school leaders and leadership teams is to lead the building of culture and aspiration in each community, and simultaneously develop and nurture the continual growth and development of quality teaching that leads to improved outcomes for students in an ever-increasing complex and uncertain world.

Therefore, the AISSA will work with the Independent sector to strengthen outcomes for schools and educationally disadvantaged schools and students through two initiatives:

- A. *Strengthening School Leadership, Excellence and Innovation*
- B. *Building Teacher Efficacy*

Initiative A: Strengthening School Leadership, Excellence and Innovation

A critical initiative over the course of this work plan is to implement a robust leadership strand to empower leaders to drive-forward strategies that will contribute to whole-of-school priorities within individual communities. Leaders will be equipped to develop agile and responsive approaches to building culture and managing change in complex environments.

A key element includes supporting and enhancing the skills of distributed leadership teams in schools. Guided by a shared vision and focused goals grounded in students and learning experiences in schools, these teams will be equipped to work with capacity, autonomy and accountability in their individual contexts. This distributed leadership focus includes supporting developing learning leaders, teams and instructional coaches.

An innovation lens will equip leaders and leadership teams to explore learning success within contemporary organising frameworks and competencies, including emerging technologies such as virtual reality technology. Building on the work of the previous CAF work plan, a staff member will continue to be employed part-time, working alongside individual schools, Vocational and Educational Training (VET) leaders and industry to successfully navigate high quality industry partnership opportunities.

All schools across the sector will have the opportunity to participate in this initiative, which will incorporate face-to-face and online modes of learning using video conferencing, to facilitate equitable access for all. Having regard to the objectives of the Choice and Affordability Fund, AISSA Senior Educational Consultants will be available to provide in-school implementation advice and support, so that new learning can become embedded within the system and structures within the school.

Eligible schools

This initiative is open to all schools across the Independent sector. Mechanisms, such as use of video conferencing and exploring the use of regional and outer metropolitan areas as learning locations, will support participation from rural schools and schools located in educationally disadvantaged communities.

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Timeframes

The Strengthening School Leadership, Excellence and Innovation initiative will take place across the entirety of the quadrennium (2022 – 2025).

Outcomes

| Objectives/expected outcomes | Indicators of success |
|--|--|
| <ul style="list-style-type: none"> • School leaders strengthen their knowledge and skills in leading complex communities. • The enhanced skills of distributed leadership teams in schools drive teacher learning and growth. • There will be an increased awareness of high-quality industry partnership opportunities for students. • Schools will be supported to meet their regulatory requirements. • Leaders and leadership teams to explore learning success within contemporary organising frameworks and competencies, including access to virtual reality technology. | <ul style="list-style-type: none"> • Each year, at least 80% of participating leaders leadership teams will indicate improved understanding of effective strategies and will have felt supported to grow in their leadership practice. • The number and geo locations of schools who have engaged in the professional learning from within this initiative to be provided in each annual report. • Resources and artefacts of effective practice will be developed. • Samples of resources, learning plans, instructional and innovation designs have been shared, in addition to being included on the AISSA website. |

Initiative B: Building Teacher Efficacy

Teacher efficacy is the extent to which teachers believe in their capacity to positively influence student learning and make an educational difference in students’ lives, regardless of background. It is positively correlated with guiding students to success and is achieved through teachers’ deepened understandings about expectations for learning success, evidence of learning and quality program design.

This initiative provides new opportunities for strengthening student outcomes and engagement in learning, through the building of teacher capacity. Teachers will grow in efficacy through the building of understanding and application of evidence-based data and instructional strategies that connect with the latest research, to amplify student learning and address educational disadvantage. Professional learning will be provided that addresses the revised Australian Curriculum, including English, Mathematics, the General Capabilities, and Aboriginal and Torres Strait Islander histories and cultures. Learning design, moderation and assessment, together with an intentional focus on growing STEM and digital literacy capability, will support teachers with key building blocks for effective practice to address educational disadvantage.

Teachers will be involved in communities of practice to connect and implement cycles that mirror the characteristics of effective teacher professional development as described by Sims et al, 2021: helping teachers gain new insights, pursue new goal-directed behaviour, acquire new skills and embed changes in their practice.

Modes of delivery will include both central and regional face to face delivery, in addition to utilising online approaches through video conferencing. Training opportunities will also extend to the school support officers who play an integral role in supporting student learning under the direction of the classroom teacher. Consistent with the Strengthening School Leadership, Excellence and Innovation initiative, in-school implementation advice and support will be available, so that new learning can become embedded within the system and structures within the school.

Eligible Schools

This initiative is open to all schools across the Independent sector. Mechanisms, such as use of video conferencing and exploring the use of regional and outer metropolitan areas as learning locations, will support participation from rural schools and schools located in educationally disadvantaged communities.

Timeframes

Investing in the building of teacher efficacy to improve learning outcomes for students will take place across the entirety of the quadrennium (2022 – 2025).

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Outcomes

| Objectives/expected outcomes | Indicators of success |
|---|--|
| <ul style="list-style-type: none">• Teachers effectively access and use contemporary evidence to design learning and implement pedagogical practices to increase student engagement and achievement.• Teachers demonstrate a deepened understanding about expectations for learning success, evidence of learning and quality program development.• Communities of practice across schools contribute to the raising of the quality of learning experiences for students.• School support officers provide improved learning opportunities for students from a diverse range of backgrounds and educational settings.• Schools have access to a range of resources and case studies of best practice. | <ul style="list-style-type: none">• Each year, at least 80% of participating teachers will indicate improved understanding of effective strategies and will have felt supported to grow in pedagogical practice.• The number and geo locations of schools who have engaged in the professional learning from within this initiative to be provided in each annual report.• Resources and artefacts of effective practice will be shared, in addition to being included on the AISSA website. |

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|----------------------------|---|
| Activity/Initiative | Effective Whole School Approaches to Student Wellbeing |
| Priority | E – Student wellbeing and support |

Description

Student wellbeing is essential for both academic and social development. Rising levels of mental distress globally and in Australia’s young people have made wellbeing a key priority for governments, educators, parents and students. Accordingly, school responses have never been as important as today, and how schools frame the breadth and reach of wellbeing is significant and integral to feelings of wellbeing, connection, agency and safety.

There are numerous national and state wellbeing policies and frameworks, in addition to a plethora of resources and advice that might be accessed to underpin the integration of wellbeing programs. Consequently, schools will be assisted to navigate these, to develop appropriate and culturally responsive actions. A healthy, supportive and inclusive learning environment can only be achieved through a long-term commitment to developing a contextually appropriate whole school approach supported by a strong evidence base (Quinlan & Hone, 2020).

Over the coming quadrennium, Independent schools will be supported to critically navigate the breadth of advice to design and implement contextual whole-of-school approaches that build individual and collective wellbeing. This will be achieved through a strategy that brings together schools and recognised specialists for the formulation of advice and action plans, and where appropriate, professional learning. The building of leadership capacity to drive implementation and sustainability is a key strategy within this initiative.

Schools will connect with each other to share their approaches and programs, including their wellbeing vision, the principles that underpin their school-wide approach and how these have been informed by data and evidence. Arising from this, effective practice will be documented, shared and housed on the AISSA website, together with a repository of contemporary advice and resources.

Eligible schools

This initiative is open to all schools across the Independent sector. Multi-modal forms of meeting, including face-to-face and videoconferencing professional learning and discussions will support access for all schools across the sector.

Timeframes

The Effective Whole School Approaches to Student Wellbeing initiative will take place across the entirety of the quadrennium (2022 – 2025).

Outcomes

| Objectives/expected outcomes | Indicators of success |
|--|--|
| <ul style="list-style-type: none"> Schools will grow in expertise to understand the characteristics and elements of effective whole-of-school approaches to student wellbeing. Schools will be supported to better examine and implement contextually appropriate approaches and programs. Whole-of-school approaches to wellbeing will be developed across the sector. | <ul style="list-style-type: none"> 80% of participating schools indicate a deeper understanding of the characteristics and elements of effective whole-of-school approaches to student wellbeing. The number and geo locations of schools who have engaged in the professional learning from within this initiative to be provided in each annual report. Examples of effective practice will be developed and the AISSA website will provide a repository for contemporary advice and resources. |

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2022-25 CAF Work plan NGRB Sign Off

This 2022-25 CAF Work plan is submitted in fulfillment of the work plan requirement in part 4 of the CAF Agreement and I understand that, once approved, the work plan forms Attachment A to the CAF Agreement.

**Name and Position of the person
signing off on behalf of the NGRB:**



Anne Dunstan
Chief Executive

Date: 06/12/23

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Schedule 1 – Indicative school-level distributions 2022–2025

Transition Assistance distributed actual funding amounts for eligible schools will be subject to an annual application and assessment process against established criteria in each year of the quadrennium. As outlined in the Stakeholder Engagement Plan the AISSA has a comprehensive communication strategy which ensures that eligible schools are aware that assistance will be provided. Amounts below reflect distributed funding for system schools under one approved authority. Final allocations of Regional transition assistance will be determined by the Approved Authority for the four eligible schools. Systemic schools will be eligible for other CAF priority support.

Priority A – Choice and Affordability

| AGEID | School Name | 2022 | 2023 | 2024 | 2025 |
|-------|--|----------|----------|----------|----------|
| | Lutheran Education SA, NT & WA (Approved Authority: 22343) | \$20,000 | \$20,000 | \$20,000 | \$20,000 |

Priority B – Transition Assistance (Regional Transition Assistance)

| AGEID | School Name | 2022 | 2023 | 2024 | 2025 |
|-------|--|-----------|-----------|-----------|-----------|
| | Lutheran Education SA, NT & WA (Approved Authority: 22343) | \$148,228 | \$152,676 | \$157,256 | \$161,974 |
| 266 | Redeemer Lutheran School | | | | |
| 14290 | Tatachilla Lutheran College | | | | |
| 17261 | Faith Lutheran College Incorporated | | | | |
| 28557 | Navigator College | | | | |