
Choice and Affordability Fund

Work Plan 2022–2025

Independent Schools Victoria

Date agreed – November 2021

Choice and Affordability Fund – Work Plan 2022–2025

Independent Schools Victoria

Summary of Work Plan 2022–2025

The activities proposed under the Choice and Affordability Fund are necessary to support Victorian independent schools address the national priorities of the fund. Projects and activities include distributed funds provided directly to schools and centralised programs to best support schools. The projects and activities go beyond the normal provision of ISV's services.

ISV continued to have difficulty in progressing the projects and initiatives outlined in the 2020-2021 work plan due to the lengthy periods of lockdown and remote learning that existed in Victoria during the past two years. Our capacity to genuinely engage with schools in piloting many of the projects has been significantly hampered. However, as we move into 2022 and what we hope will see a return to a more 'normal' way of operating in Victoria, we expect to make good progress with these projects.

As some of the activities described in this Workplan are still in the pilot phase, ISV will discuss any significant changes with DESE should a later rollout mean there are significant changes in our planned approach.

All independent schools represented by the ISV Non-Government Representative Body (NGRB) will have the opportunity to access program activities.

Independent Schools Victoria (ISV) will use the Choice and Affordability Fund to address the national priorities as follows:

Helping schools understand what really matters to their community

Priority A – Choice and Affordability

ISV will develop a tool that helps principals in independent schools determine what really matters to families when enrolling in the school. This tool will enable principals to have the right conversations with families when they enrol and to assist them to make the correct choice in relation to their decision. The methodology used will result in a school's philosophy being aligned with the needs and wants of existing and prospective parents.

There are three separate components to this initiative:

1. What Really Matters
2. Vision and Values
3. Leading Learning that Matters (LLtM) Masters and Mentoring

These components are explained in more detail in the Work Plan.

A transition plan for schools to the Direct Measure of Income funding arrangements and in the wake of COVID-19

Priority B – Transition Assistance

ISV will work with the twelve nominated Regional Transition Assistance (RTA) schools to develop a 'Sustainability Plan' for each school to consider their viability and business model into the future.

Each RTA school will receive annual direct grants, based on a formula designed to ensure an equitable allocation for each of the twelve nominated schools. The formula is based on a consistent level of funding growth per student for each school, with a minimum floor to ensure each school receives sufficient funding to be able to implement an effective transition program. Each school's funding allocations will be recalculated in 2026, or possibly earlier if an individual school experiences a significant change in its funding profile.

Choice and Affordability Fund – Work Plan 2022–2025

Independent Schools Victoria

The RTA funding must be used by schools to assist with the transition to a new funding entitlement under DMI. Funding cannot be used simply as a replacement for lost recurrent funding. ISV will work with each school to develop and implement their sustainability plan. While each school will receive a direct grant, they can choose to access specialised assistance programs, projects and tools delivered by ISV or by other organisations. Plans must align with the Australian Government’s CAF funding priorities, including:

- how the plan benefits students and the school community
- how the plan demonstrates effectiveness and efficiency for taxpayer funding
- how the plan helps the school to transition by 2029 to its new funding entitlement under the DMI.

Nominated RTA schools will also be able to access other ISV initiatives supported by the CAF. The development and implementation of these initiatives will be supported by centralised expenditure of the CAF. These initiatives include:

- Assessing financial risk and safeguarding your school’s future
- Data-informed assessments for school sustainability
- innovationXdesign
- StrategyStory
- Governance, Compliance and Employment Relations Training
- Employment Relations Service Provision
- Deep Dive Professional Learning

These initiatives are explained in more detail in the Work Plan.

ISV will also provide assistance to schools that either experience reduced funding as a result of the move to the DMI funding methodology compared to the former SES funding methodology (transition schools), or that are eligible under the former National Adjustment Assistance Fund (NAAF). Like RTA schools, transition and NAAF schools will be required to submit a Sustainability Plan. The key difference between RTA schools, transition schools and NAAF schools is that while these schools will have access to funding, the amount of financial assistance directed to transition schools and NAAF schools under the CAF would be considered on a case-by-case basis.

Special circumstances funding

Priority C – Special Circumstances Funding

This project provides access to funding support where schools and their students are affected by special circumstances and in areas affected by pandemics, drought or other natural disasters.

Schools must apply to ISV to access funding, and meet the following criteria to access funding:

- Unexpected: the special circumstances could not have been reasonably foreseen
- Causing severe financial difficulty: the school faces a real prospect of having to cease a large part of its activities or significantly lower its educational services
- Short-term: the school should be able to overcome the financial difficulty and resume operations
- Special need: the school has exhausted all other options to remedy the financial situation.

Should the need arise for short term emergency assistance, ISV will assess the application in accordance with the criteria identified above and provide specific grants. All applications will be assessed against an assessment rubric.

Funding will be put aside each year to assist ISV to meet schools’ needs as special circumstances occur. Where schools do not need to access this funding, ISV is also developing contingencies to ensure that the money does not remain uncommitted at the end of 2029.

How can we have a positive impact on student wellbeing and equip students to creatively face the challenges of the future?

Choice and Affordability Fund – Work Plan 2022–2025

Independent Schools Victoria

Priority E – Student wellbeing and support

In this initiative, ISV wants to move away from the catch all tag of 'wellbeing' and address the broader factors that contribute to the social development of students and their engagement with the community and society as a whole. The initiative consists of three elements:

1. Endeavour Initiative
2. Project Wayfinder
3. Transformative Repair

ISV staff will pilot this work in a small number of schools with the assistance of external experts providing a mixture of face to face and online learning. If successful, the program will be expanded to more schools across the state including in both metropolitan and regional areas.

The expenditure will be both centralised and distributed to participating schools for assistance around staffing, resourcing and materials.

The three elements are explained in more detail in the Work Plan.

Choice and Affordability Fund – Work Plan 2022–2025

Independent Schools Victoria

Budget for 2022–2025

Activities/Initiatives	Expenditure type	2022	2023	2024	2025
<u>A – Choice and Affordability</u>					
<i>Helping schools understand what really matters to their community</i>	Centralised	\$724,153	\$796,569	\$876,226	\$963,848
	Distributed	\$100,000	\$103,000	\$106,090	\$109,273
<u>B – Transition Assistance</u>					
<i>A transition plan for schools to the Direct Measure of Income funding arrangements and in the wake of COVID-19 – Regional Transition Assistance</i>	Centralised	\$0	\$0	\$0	\$0
	Distributed	\$990,570	\$1,892,580	\$2,858,440	\$3,891,220
<i>Transition assistance - National Adjustment Assistance Fund</i>	Centralised	\$120,000	\$132,000	\$145,200	\$159,720
	Distributed	\$270,054	\$382,887	\$507,114	\$623,480
<i>Additional Transition Assistance schools</i>	Centralised	\$60,000	\$66,000	\$72,600	\$79,860
	Distributed	\$655,395	\$929,229	\$1,179,663	\$1,431,694
Total for Priority B	Centralised	\$180,000	\$198,000	\$217,800	\$239,580
	Distributed	\$1,916,019	\$3,204,696	\$4,545,217	\$5,946,394
<u>C – Special Circumstances Funding</u>					
Special circumstances funding	Centralised	\$120,000	\$132,000	\$145,200	\$159,720
	Distributed	\$150,000	\$154,500	\$159,135	\$163,909
<u>E – Student wellbeing and support</u>					
How can we have a positive impact on student wellbeing and equip students to creatively face the challenges of the future?	Centralised	\$978,978	\$1,076,876	\$1,184,564	\$1,303,020
	Distributed	\$150,000	\$154,500	\$159,135	\$163,909
	Administrative costs	\$83,383	\$116,403	\$147,867	\$180,993
	Total expenditure	\$4,405,533	\$5,936,543	\$7,541,234	\$9,230,646
	Deferred funding	\$19,791,565	\$23,169,172	\$25,220,612	\$25,869,522

Choice and Affordability Fund – Work Plan 2022–2025

Independent Schools Victoria

Other funding sources

Activities/Initiatives	Other funding source	2022	2023	2024	2025
<u>A – Choice and Affordability</u>					
<i>Helping schools understand what really matters to their community</i>	Interest income	\$30,000	\$30,000	\$30,000	\$30,000

Choice and Affordability Fund – Work Plan 2022–2025
Independent Schools Victoria

Expenditure Profile for 2022–2029

	2022	2023	2024	2025	2026*	2027*	2028*	2029*
NGRB's total estimated funding allocation as advised by the department	\$9,013,738	\$9,284,150	\$9,562,674	\$9,849,556	\$10,145,042	\$10,449,392	\$10,762,876	\$11,085,762
NGRB's estimated Regional Transition Assistance funding allocation as advised by the department	\$3,442,338	\$3,545,608	\$3,651,976	\$3,761,536	\$3,874,382	\$3,990,612	\$4,110,332	\$4,233,642
Accrued deferred funding from 2020 and 2021 to be carried forward to 2022	\$15,093,360							
Accrued interest earned on funds held in 2020 and 2021 to be carried forward to 2022	\$60,000							
NGRB's planned expenditure for the relevant year	\$4,405,533	\$5,936,543	\$7,541,234	\$9,230,646	\$13,796,165	\$15,955,280	\$18,699,070	\$19,982,079
NGRB's planned regional transition assistance expenditure for the relevant year	\$990,570	\$1,892,580	\$2,858,440	\$3,891,220	\$4,993,120	\$6,166,510	\$7,417,080	\$8,748,910
NGRB's planned deferred funding for the relevant year to be spent in a future year	\$4,668,205	\$3,347,607	\$2,021,440	\$618,910	-	-	-	
Accrued deferred funding from the relevant year and previous years to be spent in a future year	\$19,791,565	\$23,169,172	\$25,220,612	\$25,869,522	\$22,248,399	\$16,722,511	\$8,866,317	

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

Choice and Affordability Fund – Work Plan 2022–2025

Independent Schools Victoria

Rationale for deferred funding

Most of the funding provided through the CAF is linked to DMI transition. The Commonwealth transition arrangements mean that the negative impact of DMI for schools remains relatively small in the early years, and increases significantly over the transition period. ISV's CAF allocations for transition reflect these arrangements.

Under the other CAF priorities, many of the activities and initiatives to be undertaken over the life of the CAF will continue to be developed and refined in the next couple of years. This is particularly as a result of delays in progressing some of this work due to the COVID situation in Victoria during 2020 and 2021. Once the activities and initiatives have been fully developed and piloted, their rollout is expected to be accelerated over the remaining years of the CAF.

Choice and Affordability Fund – Work Plan 2022–2025

Independent Schools Victoria

Detailed descriptions of activities and/or initiatives

Activity/Initiative	Helping schools understand what really matters to their community
Priority	A – Choice and Affordability

Description

ISV will develop a tool that helps principals in independent schools determine what really matters to families when enrolling in the school. This tool will enable principals to have the right conversations with families when they enrol and to assist them to make the correct choice in relation to their decision. The methodology used will result in a school's philosophy being aligned with the needs and wants of existing and prospective parents.

There are three separate components to this initiative:

1. What Really Matters
2. Vision and Values
3. Leading Learning that Matters (LLtM) Masters and Mentoring

What Really Matters

This project aims to gain an understanding of what really matters to parents when they choose a school for their children, what they expect from a school and what influences their decision making.

The project aims to:

- Improve the understanding of how parents typically choose a school
- Determine parental core mission(s) in choosing a school
- Identify parents' key expectations and/or concerns which influence their decision-making process.

The findings are expected to enable schools and parents to narrow down their school choice, based on what a parent really wants from a school and what a school can provide. This will also improve a school's Net Promoter Score and increase retention rates in the long run.

This project asks participating schools to invite parents who have made the decision to enrol their child/children within the last 12 months, to volunteer to participate in the confidential interview process, irrespective as to whether they have already commenced at the school.

The following questions will be addressed:

1. How do parents describe their experience when choosing an Independent school?
2. What really matters to parents and what do they expect from a school?
3. What are the key elements that influence parents' decisions and why?
4. What resources and support would be useful in helping parents to make decisions?

The data collected from the interviews will be used at an aggregate level and only de-identified data will be used in our reporting. All research output will be anonymous, no specific individual or school will be identified.

Vision and Values

When guided by a strong vision, mission and meaningful core values, a school has purpose, direction and a strong culture.

In this project, ISV will work with schools to help them define what they stand for. Through a collaborative incubator model, we will help schools articulate their vision, mission and values together with their school community:

Choice and Affordability Fund – Work Plan 2022–2025

Independent Schools Victoria

- Discover and tell the school’s story
- Unpack the data and the impact of COVID-19 to define (or redefine) the school’s core values
- Develop a compact and compelling set of guiding statements to inform immediate and future decision-making
- Set the foundations for a whole-of-school communications plan – backed by data, information and the power of story – to guide future development of the school’s strategy.

Leading Learning that Matters (LLtM) Masters and Mentoring

This project aims to support Principals across four different areas:

1. Using existing ISV Professional Learning Programs such as the Principals’ Executive Network, the Emerging Principals’ Program and the Principals’ Leadership Academy
2. Developing targeted ISV Professional Learning, including: Financial management, VRQA Audit Training and Curriculum Auditing
3. Tailored mentoring programs for individual schools
4. Ambassadorial consulting in areas of need for each school.

Participating principals will be free to choose whatever is appropriate for their needs.

Most of the expenditure will be centralised, especially in the first year. Expenditure is twofold - working with schools on the development of the methodology and values framework along with development of the digital tool and extra resources for parents on The Parents’ Website. Some funding will be distributed directly to schools to assist with the development and implementation of the methodology and framework e.g. parent meetings, staff training, surveys. All represented schools will be eligible to participate in the development of the framework and all represented schools will have access to the digital tool and framework once it has been developed.

Eligible schools

All represented schools are eligible to participate in this project.

Timeframes

These projects commenced in 2021. The research component of What Really Matters will continue for the next two years. The results of this research, and the other two projects, will then be available to schools for the period of the CAF.

Choice and Affordability Fund – Work Plan 2022–2025

Independent Schools Victoria

Outcomes

Objectives/expected outcomes	Indicators of success
<ol style="list-style-type: none"> 1. Methodology to align the school's philosophy with the needs and wants of existing and prospective parents 2. Develop and deliver values initiative to define and align school's values to strategy 3. Design a framework to help parents choose a school that is right for their student 4. Develop characteristics and desires of prospective parents as a critical component to the framework 5. Refine digital tool for prospective parents 6. Provision of increased support for Principals to better lead their schools 	<ol style="list-style-type: none"> 1. Up to 10 schools participating in the values project to contributing to the development of the values framework. 2. Digital tool and website being available for parents to use to find schools that align to their individual world view and purpose – at least 10 schools using the tool and website in the first year of its release 3. An increase in the number and range of material concerning parental choice on The Parents' Website and the number of times the material is accessed 4. Improved capacity and confidence of Principals to lead their schools as measured by opinion surveys of participating Principals

Risk Management

Risk	How the risk will be managed
Participation of schools in these activities, particularly due to impact of COVID	Regular and close communication with participating schools to ensure they are willing and able to maintain participation
Active and positive participation of parents in research project	Working closely with and assisting participating schools to engage with parents
Participation of Principals in LLtM Masters and Mentoring	Extensively use ISV's connections with Principals to ensure a sufficient number of participants

Choice and Affordability Fund – Work Plan 2022–2025

Independent Schools Victoria

Key stakeholders

Stakeholder & Interest/Impact	Engagement Strategy
Participating schools and their parents The activity helps schools align their philosophy with the needs and wants of existing and prospective parents and will assist parents in choosing a school that is right for their student	The ISV project team is in regular contact with participating schools
Participating Principals The activities will be developed by ISV in consultation with participating principals, and they will be free to choose whatever is appropriate for their needs.	The ISV project team consists of highly experienced former Principals and they will maintain regular contact with participating Principals
Victorian Department of Education and Training (Vic DET) Although there is currently no state funding being used for these initiatives, Vic DET provides financial support for Victorian Independent schools that may, in the future, cross-over with elements of the CAF.	ISV will ensure that both levels of government are aware of projects and areas of focus that are being supported through funding from multiple sources throughout the life of the CAF.

Choice and Affordability Fund – Work Plan 2022–2025

Independent Schools Victoria

Activity/Initiative	A transition plan for schools to the Direct Measure of Income funding arrangements and in the wake of COVID-19
Priority	B – Transition Assistance

Description

ISV will work with nominated Regional Transition Assistance (RTA) schools to develop a 'Sustainability Plan' for each school to consider their viability and business model into the future.

Each RTA school will receive annual direct grants, based on a formula designed to ensure an equitable allocation for each of the twelve nominated schools. The formula is based on a consistent level of funding growth per student for each school, with a minimum floor to ensure each school receives sufficient funding to be able to implement an effective transition program. Each school's funding allocations will be recalculated in 2026, or possibly earlier if an individual school experiences a significant change in its funding profile.

The RTA funding must be used by schools to assist with the transition to a new funding entitlement under DMI. Funding cannot be used simply as a replacement for lost recurrent funding. ISV will work with each school to develop and implement their sustainability plan. While each school will receive a direct grant, they can choose to access specialised assistance programs, projects and tools delivered by ISV or by other organisations. Plans must align with the Australian Government's CAF funding priorities, including:

- how the plan benefits students and the school community
- how the plan demonstrates effectiveness and efficiency for taxpayer funding
- how the plan helps the school to transition by 2029 to its new funding entitlement under the DMI.

ISV will also provide assistance to other Victorian Independent schools that either experience reduced funding as a result of the move to the DMI funding methodology compared to the former SES funding methodology (transition schools), or are eligible under the former National Adjustment Assistance Fund (NAAF). Like RTA schools, transition and NAAF schools will be required to submit a Sustainability Plan. The key difference between RTA schools, transition schools and NAAF schools is that while these schools will have access to funding, the amount of financial assistance directed to transition schools and NAAF schools under the CAF would be considered on a case-by-case basis.

RTA, transition and NAAF schools will also be able to access other ISV initiatives supported by the CAF. The development and implementation of these initiatives will be supported by centralised expenditure of the CAF. These initiatives include:

Assessing financial risk and safeguarding your school's future

The COVID-19 pandemic has shown that significant disruptions to school operations can occur at any time. Schools need to have enough financial health to weather these types of environmental shocks to remain viable into the future.

The Composite Financial Index (CFI) helps provide schools with a detailed understanding of their financial position and susceptibility to the kind of external risks that COVID-19 imposed upon schools.

This online tool will provide schools with a series of financial ratios across key indicators to determine a school's relative financial strength and exposure to risk.

A report providing guidance and suggestions around the results will help schools by providing a simple way to assess their financial risks and to assess the key strategic financial priorities for the school, given its risk profile.

Choice and Affordability Fund – Work Plan 2022–2025

Independent Schools Victoria

Data-informed assessments for school sustainability

This project will bring together data from across ISV to develop and provide an indication of school sustainability.

The tool will provide a series of indicators across four quadrants – Educational, Economic, Social and Cultural – to provide an overall picture of the school’s sustainability using a wide variety of measures that go above traditional financial indicators.

These metrics will enable schools to determine where they may face pressure to their short and long-term sustainability by conducting periodic organisational health checks.

innovationXdesign

Contemporary schools need to be agile. They need to be able to reassess, adapt their plans and iteratively experiment with ideas, as they navigate the uncertainties and complexities of the world.

With this in mind, ISV has developed a coherent and adaptive approach to innovation. It brings together world class processes, strategies and tools that have been created and adapted to the context of Victorian Independent schools; we call this innovationXdesign.

Participating schools learn how to create powerful and meaningful innovationXdesign. In particular, schools will:

- Uncover the fundamentals of innovationXdesign
- Explore how innovationXdesign can be applied in educational settings
- Develop the mindsets, skillsets and toolsets required for each stage of the innovationXdesign journey
- Learn how to run an innovationXdesign ‘Sprint’.

StrategyStory

StrategyStory for schools creates powerful and engaging strategies tailored to the distinctive needs of independent schools. It does this by weaving together the intellectual focus of strategic logic with the emotional power of storytelling.

It will guide schools, step-by-step, through a program that enables participants to set the scale and pace of strategic change while harnessing the untapped creative energies and skills of staff and students.

This innovative approach to strategy and transformation will equip schools with new capabilities in strategic management and storytelling.

Governance, Compliance and Employment Relations Training

ISV will develop a series of interactive, self-paced online learning modules on governance, compliance and occupational health and safety in the independent school sector. These courses will provide an overview of the principles and practices of good governance in independent schools as well as the legal requirements for managing compliance and occupational health and safety in the school environment.

Employment Relations Service Provision

This project will provide a more comprehensive advisory service, to supplement the resources and advice that the ISV Employment Relations Team already provides in the area of workplace change.

This service will guide schools on the approaches and requirements associated with restructuring – prior to commencing, rather than after business decisions have been made.

The aim is to ensure that schools are able to obtain advice and support on the range of options and approaches, to ensure a more comprehensive and planned approach to reviewing services.

Choice and Affordability Fund – Work Plan 2022–2025

Independent Schools Victoria

Deep Dive Professional Learning

This project aims to work with a small number of pilot schools to develop a customised, whole-of-school approach to professional learning.

The project team will undertake audits of participating schools to capture data and information on each school's current professional learning activities. These findings will be captured in a draft report, to be discussed with each school's leadership team. The ISV project team will then draft a customised, whole-of-school approach to implementing professional learning at the school and ISV will work with the school leadership team to support them with appropriate resources through the implementation process.

Following completion of the pilot program, we aim to offer this initiative to other schools.

Eligible schools

Schools that are eligible to be considered for Regional Transition Assistance, that were previously eligible to access support under the National Adjustment Assistance Fund, and that experience a reduction in funding under the DMI methodology relative to the SES methodology will have access to support under this activity. The schools eligible for Regional Transition Assistance and National Adjustment Assistance Fund are those identified by the Department in 2020 for inclusion. Transition Assistance will also be made available to schools negatively impacted by the shift to the Direct Measure of Income (DMI) funding arrangements, consistent with the CAF guidelines.

Timeframes

Funding will start to flow to schools in 2022, with the implementation of the DMI funding methodology for schools that are negatively impacted by the change. The development, implementation and refinement of the initiatives listed above will occur over the next couple of years. Direct funding to the nominated schools and indirect support for schools to implement projects will continue for the period of the CAF.

Choice and Affordability Fund – Work Plan 2022–2025

Independent Schools Victoria

Outcomes

Objectives/expected outcomes	Indicators of success
<ol style="list-style-type: none"> 1. A sustainability plan for each identified school and support for these schools through the transition process 2. A financial viability assessment available for schools 3. An organisational health check tool available for school leaders 4. Training materials available in key areas of reform (i.e. governance, compliance and employment relations) 5. Increased strategic planning capabilities for school leaders 6. Increased knowledge and capacity in innovationXdesign principles 7. Provision of a more comprehensive Employment Relations advisory service 8. The development of a customised, whole-of-school approach to professional learning. 	<ol style="list-style-type: none"> 1. Each identified school is working with ISV to implement their sustainability plan and the plans indicate that schools will remain financially viable 2. Participating schools have conducted a 'health check' and are acting on the outcomes of their check 3. Increased numbers of schools participating in training modules and accessing training materials 4. Increased numbers of schools working with ISV on their strategic plans 5. Increased numbers of schools adopting the principles of innovationXdesign 6. Increased number of schools accessing Employment Relations advisory service 7. Increased numbers of schools adopting the whole-of-school approach to professional learning.

Risk Management

Risk	How the risk will be managed
On-going changes in schools' DMI scores threaten the efficacy of their sustainability plans	ISV to work with schools to ensure that their sustainability plans include sensitivity analysis that provides sufficient flexibility to adapt to changing funding circumstances
Nominated schools do not provide an adequate sustainability plan and put their allocated funding at risk	ISV to work closely with each school to ensure that their plans meet the requirements of the CAF
ISV's projects are not utilised by schools	ISV to regularly demonstrate to schools the value of the projects so that a sufficient number of schools utilise them

Choice and Affordability Fund – Work Plan 2022–2025

Independent Schools Victoria

Key stakeholders

Stakeholder & Interest/Impact	Engagement Strategy
<p>Nominated Regional Transition Assistance schools, NAAF schools and other schools negatively impacted by transition to the DMI methodology</p> <p>The activity assists these schools to develop and implement a sustainability plan that considers their viability and business model into the future, particularly as they transition to the Direct Measure of Income arrangements.</p>	<p>ISV will maintain regular and ongoing contact with these schools to ensure that they are aware of the various projects and initiatives available to them as they develop and implement their sustainability plans.</p>
<p>System Authorities</p> <p>System authorities may be responsible for schools that are eligible to receive funding under this element of the CAF.</p>	<p>ISV will maintain regular and ongoing contact with System Authorities to ensure that they are aware of which of their member schools are eligible to receive funding, and why, and the supports available to support those schools.</p>
<p>Victorian Department of Education and Training (Vic DET)</p> <p>Vic DET provides financial support for Victorian Independent schools that may cross-over with elements of the CAF.</p>	<p>ISV will ensure that both levels of government are aware of projects and areas of focus that are being supported through funding from multiple sources.</p>

Choice and Affordability Fund – Work Plan 2022–2025

Independent Schools Victoria

Activity/Initiative	Special circumstances funding
Priority	C – Special Circumstances Funding

Description

Special Circumstances Funding

This project provides access to funding support where schools and their students are affected by special circumstances and in areas affected by pandemics, drought or other natural disasters.

Funding will not automatically be provided to any school that is affected by one of these events. Instead, schools must submit an application to ISV that meets the following criteria in order to access funding:

- Unexpected: the special circumstances could not have been reasonably foreseen
- Causing severe financial difficulty: the school faces a real prospect of having to cease a large part of its activities or significantly lower its educational services
- Short-term: the school should be able to overcome the financial difficulty and resume operations
- Special need: the school has exhausted all other options to remedy the financial situation.

Should the need arise for short term emergency assistance, ISV will assess the application in accordance with the criteria identified above and provide specific grants. ISV is developing an assessment rubric against which any school's application will be assessed. ISV will also require schools to provide on-going reports, outlining their progress and the continuing financial and educational impact of the event.

Support provided for schools through this element will be in the form of direct grants to the schools and centralised support from ISV. The centralised support will consist of managing the application and assessment processes as well as providing assistance for schools in the aftermath of their unexpected circumstances. This assistance could be, for example, helping schools connect with local support agencies. While individual circumstances will affect the level of funding provided to individual schools, ISV would generally expect that schools would make a financial contribution towards the project.

Given the uncertainty of demand for this funding, a set amount of funding will be put aside each year to assist ISV to meet schools' needs as special circumstances occur. Where schools do not need to access all of the funding allocated during a calendar year, ISV will assess annually whether this funding should be carried forward for future Special Circumstances applications or re-allocated to other priorities. ISV is also developing contingencies to ensure that the money does not remain uncommitted at the end of 2029.

Eligible schools

All participating schools are eligible to access funding through this initiative. Schools will need to meet the specific criteria outlined above to access funding.

Timeframes

Direct funding to eligible schools will continue for the period of the CAF. Schools will be able to apply for funding at any point.

Choice and Affordability Fund – Work Plan 2022–2025

Independent Schools Victoria

Outcomes

Objectives/expected outcomes	Indicators of success
Access to funding support where schools and their students are affected by special circumstances and in areas affected by pandemics, drought or other natural disasters.	Schools are able to access funding in a simple and timely manner so that their urgent need is met. Schools are able to continue to operate throughout the crisis.

Risk Management

Risk	How the risk will be managed
The process for schools to access funding is too slow and cumbersome	ISV to ensure that the process for accessing funds is clear, simple, responsive, and understanding of the potential trauma being experienced by schools
Eligible schools are unaware of this funding	ISV to ensure that all schools are kept informed of the existence of this funding stream, and that affected schools are contacted and informed in a timely manner
With the level of demand unknown, demand for the funding is significantly different to the level of funding allocated	ISV to continually review allocations of funding against applications and to develop contingencies should demand exceed available funds
Schools attempt to use the funding for capital purposes	ISV will remind schools at all points that funding cannot be used for capital purposes, except for capital equipment.

Choice and Affordability Fund – Work Plan 2022–2025

Independent Schools Victoria

Key stakeholders

Stakeholder & Interest/Impact	Engagement Strategy
<p>Victorian Independent schools</p> <p>This project provides access to funding support where schools and their students are affected by special circumstances and in areas affected by drought or other natural disasters.</p>	<p>ISV will ensure that schools that are eligible to access funding support under this initiative are aware of it and are provided with information about how to access funding support in a timely manner</p>
<p>System Authorities</p> <p>System authorities may be responsible for schools that are eligible to receive funding under this element of the CAF.</p>	<p>ISV will maintain regular and ongoing contact with System Authorities to ensure that they are aware of which of their member schools are eligible to receive funding, and why, and the supports available to support those schools.</p>
<p>Victorian Department of Education and Training (Vic DET)</p> <p>Vic DET provides financial support for Victorian Independent schools that may cross-over with elements of the CAF.</p>	<p>ISV will ensure that both levels of government are aware of projects and areas of focus that are being supported through funding from multiple sources.</p>

Activity/Initiative	How can we have a positive impact on student wellbeing and equip students to creatively face the challenges of the future?
Priority	E – Student wellbeing and support

Description

In this initiative, ISV wants to move away from the catch all tag of 'wellbeing' and address the broader factors that contribute to the social development of students and their engagement with the community and society as a whole. The initiative consists of three elements:

1. Endeavour Initiative
2. Project Wayfinder
3. Transformative Repair

ISV staff will pilot this work in a small number of schools with the assistance of external experts providing a mixture of face to face and online learning. If successful, the program will be expanded to more schools across the state including in metropolitan areas.

The expenditure will be both centralised and distributed to participating schools for assistance around staffing, resourcing and materials.

Endeavour Initiative

This is a program for schools and communities that works to improve the core of wellbeing issues for students, staff and local communities. By helping to develop or enhance core capabilities, the project will contribute to the skills growth of educationally disadvantaged students, improve school retention and educational attainment levels and give the community’s young people the tools and abilities to navigate the future.

ISV is harnessing a variety of experiences to help provide resources and activities through a research-based, long term project investing in the impact to student numeracy and literacy of a specialised set of programs based in arts learning and wellbeing. Core elements of the initiative are:

- Develop your purpose; find your voice
- Own your learning process
- Problem/project-based learning
- Communicate your own story.

ISV will continue its work with two pilot regions (Portland and Shepparton) and then make the findings and resources available for all participating schools.

Project Wayfinder

Project Wayfinder’s two signature wellbeing programs have been incubated through the design thinking process at Stanford University’s d.school in the K-12 lab and aim to support the social emotional development of students in years 7-12. The two programs are:

- Belonging (Years 7-9) – this program guides students to build compassionate, meaningful relationships with themselves, other people, and the wider world.
- Purpose (Years 10-12) – this program guides students to explore who they are and what matters to them so they can purposefully navigate their life ahead.

The programs are inspired by cutting-edge academic research and draw on practices of traditional wayfinding navigation as a metaphor for stepping into life with purpose.

Transformative Repair

This research initiative aims to investigate how strategic and sustained engagement with transformative repair as an artistic practice can create supportive conditions for individuals and communities to find personal and broader purpose in times of unprecedented uncertainty and challenge.

Choice and Affordability Fund – Work Plan 2022–2025

Independent Schools Victoria

By designing effective ways to ‘repair’ communities, both literally and figuratively, the teams from Project Zero and ISV will explore and evaluate how the practice of transformative repair might support schools with new ways of thinking, compassion, self-care and an ethic of care for others.

Over the next two years, participating schools will engage in a pilot program for students that supports them in:

- finding their own voice and articulating their personal and broader vision for the future
- building a personal and a community story that embraces and reimagines challenges as opportunities for transformative repair, and
- sharing their stories of themselves and their communities through the arts.

Eligible schools

While all participating schools will be eligible to participate in the development of the program and subsequent use of the materials, we will look to run this initiative predominately in educationally disadvantaged communities and regional settings.

Timeframes

The research, evaluation and piloting elements of this initiative will continue for the next two years. The outcomes of that work and the resources and programs developed will continue for the period of the CAF.

Outcomes

Objectives/expected outcomes	Indicators of success
A program for schools and communities that works to the core of wellbeing issues in students.	<ol style="list-style-type: none">1. Improved student engagement in participating schools measured through pre- and post-surveys2. High satisfaction in the program from school leaders in participating schools and high program satisfaction among participating students3. Increased student retention into years 11 and 12 (long term outcome)4. Increased year 12 attainment in participating schools (long term outcome)5. An evaluation into the project outcomes

Choice and Affordability Fund – Work Plan 2022–2025

Independent Schools Victoria

Risk Management

Risk	How the risk will be managed
Participation of schools in these activities, particularly due to impact of COVID	Regular and close communication with participating schools to ensure they are willing and able to maintain participation
ISV's projects are not utilised by schools	ISV to regularly demonstrate to schools the value of the projects so that a sufficient number of schools utilise them

Key stakeholders

Stakeholder & Interest/Impact	Engagement Strategy
Participating pilot schools ISV staff with pilot this work in a small number of schools with the assistance of external experts.	ISV will maintain regular and ongoing contact with the pilot schools to ensure that the project is on track and meeting their needs.
System Authorities System authorities may be responsible for schools that are eligible to receive funding under this element of the CAF.	ISV will maintain regular and ongoing contact with System Authorities to ensure that they are aware of which of their member schools are eligible to receive funding, and why, and the supports available to support those schools.
Victorian Department of Education and Training (Vic DET) Vic DET provides financial support for Victorian Independent schools that may cross-over with elements of the CAF.	ISV will ensure that both levels of government are aware of projects and areas of focus that are being supported through funding from multiple sources.

Choice and Affordability Fund – Work Plan 2022–2025

Independent Schools Victoria

2022-25 CAF Workplan NGRB Sign Off

This 2022-25 CAF Workplan is submitted in fulfillment of the workplan 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:** Michelle Green, Chief Executive

Date: 15 November 2021

Choice and Affordability Fund – Work Plan 2022–2025

Independent Schools Victoria

Schedule 1 – Indicative school-level distributions 2022–2025

ISV has not, as yet, determined final allocations for Priorities C and E.

The table for Priority D was deleted as ISV is not addressing this Priority in its Workplan.

Priority A – Choice and Affordability

AGEID	School Name	2022	2023	2024	2025
	ISV will be directly distributing funds to schools but we are unable to list the individual schools and their allocations at this point in time				

Priority B – Transition Assistance

AGEID	School Name	2022	2023	2024	2025
	Regional Schools identified by DESE				
16082	Bacchus Marsh Grammar	\$30,000	\$30,570	\$31,160	\$31,750
16351	Ballarat Clarendon College	\$169,680	\$350,910	\$544,630	\$751,380
16352	Ballarat Grammar	\$30,000	\$30,570	\$31,160	\$31,750
16354	Braemar College	\$126,130	\$260,740	\$404,510	\$557,990
17709	Geelong Baptist College	\$30,000	\$30,570	\$31,160	\$31,750
16353	Gippsland Grammar	\$35,550	\$74,360	\$116,890	\$163,290
14225	Girton Grammar School	\$106,610	\$220,680	\$342,900	\$473,650
16355	Goulburn Valley Grammar School	\$147,610	\$304,820	\$472,280	\$650,580
15826	Kardinia International College	\$118,640	\$246,000	\$382,980	\$530,120
15836	Newhaven College	\$30,000	\$30,570	\$31,160	\$31,750
4012	St Paul's Anglican Grammar School	\$136,350	\$282,220	\$438,450	\$605,460
16712	The Hamilton and Alexandra College	\$30,000	\$30,570	\$31,160	\$31,750
	Transition assistance - National Adjustment Assistance Fund				
2428	Brighton Grammar School	\$15,916	\$22,566	\$35,259	\$42,792
4217	Firbank Grammar School	\$15,916	\$22,566	\$28,648	\$42,792
2176	Ivanhoe Grammar School	\$24,115	\$34,191	\$43,406	\$52,679
828	Kilvington Grammar School	\$23,151	\$32,823	\$41,670	\$50,572
837	Lowther Hall Anglican Grammar School	\$34,726	\$49,235	\$76,928	\$93,364
29056	Melbourne Grammar School	\$6,530	\$9,258	\$11,753	\$14,264
857	Mentone Grammar School	\$39,178	\$55,547	\$70,518	\$85,584
860	Methodist Ladies' College	\$14,469	\$20,515	\$26,043	\$31,608
872	Mount Scopus Memorial College	\$15,916	\$22,566	\$28,648	\$34,768
912	Penleigh & Essendon Grammar School	\$47,489	\$67,330	\$85,476	\$103,738
1113	St Leonard's College	\$32,648	\$46,289	\$58,765	\$71,320
	Additional Transition Assistance schools				
797	Haileybury	\$19,292	\$27,353	\$34,725	\$42,143
821	Ivanhoe Girls' Grammar School	\$23,151	\$32,823	\$41,670	\$50,572
1281	Melbourne Girls' Grammar School	\$10,611	\$15,044	\$19,099	\$23,179
856	Mentone Girls' Grammar School	\$23,151	\$32,823	\$41,670	\$50,572
17252	Peninsula Grammar	\$26,527	\$37,610	\$47,746	\$57,947
17867	The Geelong College	\$71,827	\$101,837	\$129,283	\$156,903
16713	Westbourne Grammar School	\$54,849	\$77,766	\$98,725	\$119,817
16324	Aitken College	\$17,140	\$24,302	\$30,852	\$37,443

Choice and Affordability Fund – Work Plan 2022–2025

Independent Schools Victoria

15834	Bayview College	\$21,815	\$30,930	\$39,266	\$47,655
3419	Beaconhills College	\$13,356	\$18,937	\$24,040	\$29,176
2482	Billanook College	\$23,507	\$33,328	\$42,311	\$51,350
758	Carey Baptist Grammar School	\$14,469	\$20,515	\$26,043	\$31,608
15837	Casey Grammar School	\$18,699	\$26,511	\$33,656	\$40,847
29729	Cornish College	\$23,507	\$33,328	\$42,311	\$51,350
2179	Eltham College	\$13,356	\$18,937	\$24,040	\$29,176
4219	Flinders Christian Community College	\$17,140	\$24,302	\$30,852	\$37,443
29065	Geelong Grammar School	\$21,221	\$30,088	\$38,197	\$46,358
17293	OneSchool Global	\$41,137	\$58,325	\$74,044	\$89,863
5517	Overnewton Anglican Community College	\$13,356	\$18,937	\$24,040	\$29,176
29172	Southern Cross Grammar	\$16,027	\$22,724	\$28,848	\$35,011
1126	St Margaret's School	\$13,356	\$18,937	\$24,040	\$29,176
1183	St Michael's Grammar School	\$15,916	\$22,566	\$28,648	\$34,768
1275	Strathcona Baptist Girls' Grammar School	\$14,692	\$20,830	\$26,444	\$32,094
13801	The Kilmore International School	\$47,266	\$67,014	\$85,075	\$103,251
1286	Toorak College	\$28,938	\$41,029	\$52,087	\$63,215
1288	Trinity Grammar School	\$15,916	\$22,566	\$28,648	\$34,768
15317	Trinity Lutheran College	\$21,815	\$30,930	\$39,266	\$47,655
28672	Woodleigh School	\$13,356	\$18,937	\$24,040	\$29,176

Priority C – Special Circumstances Funding

AGEID	School Name	2022	2023	2024	2025
	ISV will distribute funds to schools as required but which schools and the amount of funding distributed is unknown at this point in time				

Priority E – Student wellbeing and support

AGEID	School Name	2022	2023	2024	2025
	ISV will be directly distributing funds to schools but we are unable to list the individual schools and their allocations at this point in time				