
Choice and Affordability Fund work plan

2020-2021

Independent Schools Victoria

Choice and Affordability Fund

Independent Schools Victoria – Work plan 2020-2021

Summary

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.

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:

1. Helping schools understand what really matters to their community

Relevant national/local priority: (a) Choice and affordability of schools

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.

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

Relevant national/local priority: (b) Transition assistance

When the full impact of COVID-19 and the new Direct Measure of Income funding arrangements method of distributing funding is realised, there will be schools that will have significant challenges to remain financially viable. We need to create a 'new lens' through which schools can look critically at their operations and develop a new and sustainable operating model for the future. ISV will develop a 'Transition Plan' for schools to consider their viability and business model into the future. The outcome will be the creation of sustainability plans for schools and support from ISV to deliver the transition process.

ISV will also provide assistance to schools eligible under the former National Adjustment Assistance Fund (NAAF). While these schools will have access to funding, the amount of financial assistance directed to NAAF schools under the CAF would be considered on a case-by-case basis. A process and criteria for assessing school need for assistance under the former NAAF will be established. The assessment process will be transparent and funding allocated based on need.

3. Special circumstances funding

Relevant national/local priority: (c) Special circumstances funding

ISV will use funding to support schools affected by special circumstances or in priority areas such as rural, regional and remote locations or areas affected by drought or other natural disasters.

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

Relevant national/local priority: (e) Student wellbeing and support

We want 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. This initiative will develop a program for students to complete that focuses on student wellbeing, engagement, agency and skill development for the future. The program will step students through a process of self-discovery and equip them for the future in the community. We will look to run this initiative predominately in educationally disadvantaged communities and regional settings.

Summary of budget

Priority	Activities/Initiatives	Expenditure type	Choice and Affordability funding	
			2020	2021
(a)	Helping schools understand what really matters to their community	Centralised	\$113,760	\$100,775
		Distributed	\$15,799	\$56,434
(b)	Regional Transition Assistance	Centralised		
		Distributed	\$706,927	\$1,165,884
	National Adjustment Assistance Fund	Centralised		
		Distributed	\$78,997	\$105,814
	A transition plan for schools to the Direct Measure of Income funding arrangements and in the wake of COVID-19	Centralised	\$108,934	\$104,250
		Distributed	\$444,048	\$701,955
(c)	Special circumstances funding	Centralised		
		Distributed	\$43,573	\$173,750
(e)	How can we have a positive impact on student wellbeing and equip students to creatively face the challenges of the future?	Centralised	\$172,136	\$381,358
		Distributed	\$129,888	\$201,585
Administrative costs			\$169,926	\$175,704
Funding from Previous			\$0	\$6,512,325
Annual allocation			\$8,496,313	\$8,785,188
Expended			\$1,983,988	\$3,167,509
Carried forward into following year			\$6,512,325	\$12,130,004

Choice and Affordability Fund

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Initiative/activity: Helping schools understand what really matters to their community

Relevant national/local priority: (a) Choice and affordability of schools

Problem: There is often a disconnect between what parents want from a school in relation to the education of a child and the overarching educational philosophy of the school. This can potentially cause issues for schools, which are constantly managing family expectations, and can cause disruptions to students and their families. If schools had a better way to understand the choices families were trying to make when enrolling their students, they could adapt their business model to ensure they are providing an education platform that aligns with the choices that families actually make around education provision.

Solution: Develop a digital tool and values framework that helps principals in independent schools determine what really matters to families when enrolling in the school. This tool and framework 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. It will also enable prospective parents to utilise the digital tool of the values framework.

Potential actions:

1. Develop a methodology and framework to determine 'what really matters' when parents choose a school and assist schools to determine their values proposition.
2. Refine the digital tool for parents to complete the values framework.
3. Develop further resources to complement the values framework digital tool for parents on ISV's The Parents' Website concerning choosing the right school for their children.

Process:

1. Approach schools to be involved in the values project based on broadly representative criteria of our members
2. Contact a group of recent past and present parents in these participating schools to be involved in the values project
3. Conduct interviews with parents
4. Analyse interviews and develop key findings
5. Use the key findings to assist schools to determine their values proposition and outline 'what really matters' to prospective families
6. Develop a secondary tool (i.e. a questionnaire) that enables schools to determine what role the parents want them to play and if the school is the right fit for the family.

Project outcomes

1. Methodology to align the school's philosophy with the needs and wants of existing and prospective parents.
2. Process for schools to determine and enhance their values statements to effectively position themselves as the right choice for parents.
3. Development of digital tool and values framework for prospective parents to use to find

schools that align to their individual world view and purpose.

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.

Indicative budget	Expected outcomes	Indicators of success
Choice and Affordability Funding: \$129,559 (2020) \$157,209 (2021)	<ul style="list-style-type: none"> • Methodology to align the school's philosophy with the needs and wants of existing and prospective parents • Develop and deliver values initiative to define and align school's values to strategy within 2 years • Design a framework to help parents choose a school that is right for their student • Develop characteristics and desires of prospective parents as a critical component to the framework • Refine digital tool for prospective parents 	<ul style="list-style-type: none"> • 10 Schools participating in the values project to contributing to the development of the values framework. • Digital tool and website for parents to use to find schools that align to their individual world view and purpose • Uptake by at least 10 schools in first year release of digital tool and website • An increase in materials concerning parental choice on The Parents' Website

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

Relevant national/local priority: (b) Transition assistance

Problem: When the full impact of COVID-19 and the new Direct Measure of Income funding arrangements is realised, there will be schools that will have significant challenges to remain financially viable.

Solution: We need to create a 'new lens' through which schools can look critically at their operations and develop a new and sustainable operating model for the future.

This will require ISV to develop a 'Transition Plan' for schools to consider their viability and business model into the future.

Potential actions:

1. Develop a viability test to determine where schools are under threat, but they might not know it (based on funding, enrolments and demographic trends)
2. Develop a new, readily available organisational health check that schools can access at any point using isAnalyse as the platform
3. Further develop a process to assist schools with their strategic positioning
4. Expand the use and functionality of the isEducation suite of digital resources to include core accountability requirements of schools including compliance, employment relations, governance and strategic planning.
5. Create training modules on topics such as school finances, sustainability, communications and employment relations
6. Enhance ISV's employment relations service to assist schools with potential restructuring
7. Develop and offer technological and hosting solutions to align with a school's changes in strategic direction.

Process:

1. ISV to identify those schools that will lose income (government and private) and/or enrolments as their Capacity to Contribute score changes as a result of the introduction of the Direct Measure of Income funding arrangements and changes to their client group due to special circumstances (such as the impact of COVID-19 and the recent bushfires).
2. A proportion of the Choice and Affordability Fund will be allocated to schools dependent on the school developing and actioning a transition plan in collaboration with ISV.
3. At the end of the process, schools will have a sustainability plan and financial support to move forward.

Project outcome:

A sustainability plan for the school and ISV to assist schools to transition to the Direct Measure of Income funding arrangements by 2029.

Expenditure will be distributed to schools. The initial focus will be on schools that are eligible to be considered for Regional Transition Assistance and the National Adjustment Assistance Fund but any school that can demonstrate significant financial challenges as a result of COVID-19 and the new

Direct Measure of Income funding arrangements method of distributing funding will be able to access funding to develop a sustainability plan.

ISV will also provide assistance to schools eligible under the former National Adjustment Assistance Fund (NAAF). While these schools will have access to funding, the amount of financial assistance directed to NAAF schools under the CAF would be considered on a case-by-case basis.

A process and criteria for assessing school need for assistance under the former NAAF will be established. The assessment process will be transparent and funding allocated based on need.

Indicative budget	Expected outcomes	Indicators of success
Choice and Affordability Funding: \$1,338,906 (2020) \$2,077,903 (2021) (Note: Budget includes the Regional Transition Assistance and the National Adjustment Assistance Fund)	<ul style="list-style-type: none"> • Sustainability plan for the school • Support to deliver the transition process • A financial viability assessment for schools • An organisational health check tool for school leaders • Training materials in key areas of reform (i.e. governance, compliance and employment relations) • Increased strategic planning capabilities for school leaders 	<ul style="list-style-type: none"> • All identified schools are working with ISV to develop a sustainability plan • Plans indicate that schools will remain financially viable • Schools participating in training modules • Schools completing the viability assessment and the health check tool

Initiative/activity: Special circumstances funding

Relevant national/local priority: (c) Special circumstances funding

ISV will use funding to support schools affected by special circumstances or in priority areas such as rural, regional and remote locations or areas affected by drought or other natural disasters. ISV will also use the funding to assist schools requiring short term emergency assistance according to the following criteria:

- **Unexpected** - Could not have been reasonably foreseen.
- **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.
- **short term** - Schools should be able to overcome their financial difficulty and resume operations and must provide a five-year business and recovery plan.
- **a special need** - Schools have exhausted all other options to remedy the financial situation of the school.

Should the need arise for short term emergency assistance, ISV will assess the application in accordance with the criteria identified above. ISV 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.

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

Relevant national/local priority: (e) Student wellbeing and support

Problem: Safe, supportive and respectful learning environments are essential for academic and social development. While schools are well versed in supporting the academic development of students, a consistent challenge for many concerns the social development of students and, in particular, helping students to understand their purpose, value and place as Australian and global citizens.

Solution: We want 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. This initiative will develop a program for students to complete that focuses on student wellbeing, engagement, agency and skill development for the future. The program will step students through a process of self-discovery and equip them for the future in the community. We will look to run this initiative predominately in educationally disadvantaged communities and regional settings. Schools will be identified using the following criteria:

- The school is based in a regional area
- There are minimal opportunities in the region for tertiary education
- Educational outcomes (i.e. year 12 completion rates, proportion of adults with tertiary education degrees) are below the Victorian average.

Potential actions:

Develop and refine programs that specifically address the social development of students, including the identification of their life purpose, to guide their education and equip them with the core

metacognitive and essential human skills to thrive.

Process: The project will include, for example, the following core elements:

1. Develop your purpose, find your voice
2. Own your learning process
3. Problem/Project-based learning
4. Communicate your own story

ISV staff will pilot the project in a small number of schools with the assistance of external experts providing a mixture of face to face and online learning modules put together in a dedicated program for students in middle school (approximately years 7-9). If successful, the program will be expanded to more schools across the state including in metropolitan areas.

Project outcome:

A program for schools and communities that works to the core of wellbeing issues in students. By helping to develop these 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.

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

Indicative budget	Expected outcomes	Indicators of success
Choice and Affordability Funding: \$302,024 (2020) \$582,943 (2021)	<ul style="list-style-type: none"> • A program for schools and communities that works to the core of wellbeing issues in students. 	<ul style="list-style-type: none"> • Improved student engagement in participating schools measured through pre- and post-surveys • High satisfaction in the program from school leaders in participating schools and high program satisfaction among participating students • Increased student retention into years 11 and 12 (long term outcome) • Increased year 12 attainment in participating schools (long term outcome) • An evaluation into the project outcomes