
Choice and Affordability Fund Annual Report

2020

Independent Schools Victoria

Choice and Affordability Fund

Independent Schools Victoria – Annual Report 2020

Executive Summary

ISV established a number of project teams to lead the various initiatives and activities under the Choice and Affordability Fund. Due to the challenges faced by schools and ISV in 2020 (as a result of the COVID-19 pandemic and the particular circumstances in Victoria) and given that ISV's work plan wasn't finalised until late July, some of the projects didn't get started until 2021. Many projects, however, had already begun or were in the planning phase during 2020.

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

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

In our work plan, we referred to the development of a tool that will help principals in independent schools determine what really matters to families when enrolling in their school.

Our work plan listed a number of 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.

As described in the Activity Report below, these actions are at various stages of development.

2. 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

In our work plan, we referred to ISV's development of 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.

Our work plan listed a number of 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.

As described in the Activity Report below, these actions are at various stages of development.

3. Initiative/activity: Special circumstances funding

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

In our work plan, we referred to ISV using 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.

This work is progressing.

4. 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

In our work plan, we referred to ISV developing 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.

Our work plan listed potential actions as the development and refinement of 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.

As described in the Activity Report below, these actions are at various stages of development.

Progress against your agreement and/or work plan

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

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

Project title: What Really Matters

We are currently in the project planning phase. During which, we have completed the concept plan, project proposal, overview of research methods, research questions and initial desktop research on existing studies involving school choice

We are in the process of developing a short literature review, interview questions, finalising participant recruitment strategies and liaising with independent schools to launch an Expression of Interest campaign across targeted schools.

Project title: LLtM (Leading Learning that Matters) Masters Mentoring Project

The project is still in its early stages in determining how best to support the principals of the schools identified.

2. 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

Project title: Data-Informed School Assessment Tool

ISV is currently developing the Data-Informed School Assessment Tool (DISAT), a tool that brings a range of data together to assess the performance of schools across various domains. The aim of the project is to identify warning signs of schools that may be struggling, so that targeted assistance can be provided in a timely manner. The DISAT will also be used to prioritise schools' access to other elements of the Victorian Independent sector's CAF projects.

Project title: Values & Agile Strategy

In 2020, scoping the project was well underway until the Victorian COVID-19 lockdowns due disrupted our progress. Momentum was regained towards the end of the year and a clear plan of action and service delivery model for the Values & Agile Strategy project was finalised in 2021.

Project title: innovationXdesign

The first iteration has commenced and resources have been created specifically for use by Victorian independent schools and will be used for future iterations.

Project title: Training modules - Governance, Compliance, Employment Relations

The project didn't commence until April 2021 but is expected to be completed by the end of 2021.

Project Title: Employment Relations Service Provision

The project didn't commence until 2021 but is now making significant progress.

Project title: Deep Dive Professional Learning

The project didn't commence until 2021 but is now making significant progress.

3. Initiative/activity: Special circumstances funding

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

Project title: Special Circumstances Funding Allocation Project

No actions were taken in 2020 as part of this project. ISV is currently in the planning stages of the project.

4. 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

Project title: Endeavor Initiative

The original concept for the Endeavor Initiative was developed in late 2019. The purpose is to help students, parents and school staff overcome disadvantage caused by special circumstances. The project team met several times to discuss the original concepts, define key components of the project and to build a "thought plan" for progressing. The team visited the two pilot locations in February 2020. Shortly after that, however, the project was placed on hold due to COVID-19 restrictions.

The project was released from hold in March 2021 and the impact of COVID-19 has been added to the definition of special circumstances.

Project title: Project Wayfinder

The overall summary of the project's progress is that 49 educators were trained in 2020/2021; the Belonging and Purpose curricula is currently being delivered to approximately 1000 students across Victoria; three ISV staff are fully trained to deliver Project Wayfinder programs; and ISV is one of three international joint ventures for Project Wayfinder and the only one for an entire country. We have also begun the marketing rollout of Making Meaning – a wellbeing course for educators. Delivery of this course begins in July 2021.

Project title: Transformative Repair

The Transformative Repair project was originally intended to begin in October 2020 but the start date was delayed to April 2021. Since the project went live, we have worked on an intensive literature review to understand the cognitive, emotional and social demands of transformative repair, and have discussed conceptual bases of transformative repair, clarified the roles of the two teams, and discussed ways to promote and document the project on social media.

The distribution of funding

As described in ISV's work plan, Choice and Affordability funds will be expended to best meet the needs of independent schools transitioning to the Direct Measure of Income (DMI) Capacity to Contribute model. ISV's estimated 10 year profile is as follows:

| | <u>2020</u> | <u>2021</u> | <u>2022</u> | <u>2023</u> | <u>2024</u> |
|-----------------------|--------------|---------------|---------------|---------------|---------------|
| Funding from previous | | 7,854,754.00 | 12,125,216.00 | 14,860,676.00 | 15,817,718.00 |
| Annual allocation | 8,496,313.00 | 8,751,202.00 | 9,013,738.00 | 9,284,150.00 | 9,562,674.00 |
| Expended | 670,757.00 | 4,480,740.00 | 6,278,278.00 | 8,327,108.00 | 9,756,494.00 |
| Interest received | 29,198.00 | 23,564.26 | 36,375.65 | 44,582.03 | 47,453.15 |
| Carried forward | 7,854,754.00 | 12,125,216.00 | 14,860,676.00 | 15,817,718.00 | 15,623,898.00 |

| | <u>2025</u> | <u>2026</u> | <u>2027</u> | <u>2028</u> | <u>2029</u> |
|-----------------------|---------------|---------------|---------------|---------------|---------------|
| Funding from previous | 15,623,898.00 | 14,715,792.00 | 12,679,037.00 | 9,109,320.00 | 3,624,873.00 |
| Annual allocation | 9,849,556.00 | 10,145,042.00 | 10,449,392.00 | 10,762,876.00 | 11,085,762.00 |
| Expended | 10,757,662.00 | 12,181,797.00 | 14,019,109.00 | 16,247,323.00 | 14,710,635.00 |
| Interest received | 46,871.69 | 44,147.38 | 38,037.11 | 27,327.96 | 10,874.62 |
| Carried forward | 14,715,792.00 | 12,679,037.00 | 9,109,320.00 | 3,624,873.00 | - |

Activity Report

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

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

In our work plan, we referred to the development of a tool that will help principals in independent schools determine what really matters to families when enrolling in their school.

Our work plan listed a number of 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.

ISV established a number of project teams to lead this work. Due to the challenges faced by schools and ISV in 2020 (as a result of the COVID-19 pandemic and the particular circumstances in Victoria) and given that ISV's work plan wasn't finalised until late July, some of the projects didn't get started until 2021.

The following is a progress report on each project.

Project title: What Really Matters

This project is based on collaboration with the authors of a successful project being delivered in the USA by our partner organisation, the National Association of Independent Schools (NAIS). We have agreement with the authors of the assessment tool Jobs to be Done (JTBD) that we will amend and implement for the Australian context.

1. Overall summary of the project's progress:

- We are currently in the project planning phase. During which, we have completed the concept plan, project proposal, overview of research methods, research questions and initial desktop research on existing studies involving school choice
- We are in the process of developing a short literature review, interview questions, finalising participant recruitment strategies and liaising with independent schools to launch an EOI campaign across targeted schools.

2. Activities and initiatives undertaken in 2020:

- While some planning sessions were held in 2020, the project did not officially kick off until 2021.
- The planning sessions in 2020 started with a desktop research around what really matters to parents when choosing a school for their child using the JTBD approach (JTBD is a concept generated from a customer-centred mentality that enable organisations to stay relevant, competitive, and innovative).
- During 2021, the project team has continued to collect a repository of relevant existing studies to help develop a literature review and to gain a more thorough understanding of what studies had been done in the context of school choice, both locally and internationally.

3. Schools targeted:

- We are yet to establish a confirmed list of schools that are willing to become directly involved in this project. We are assessing the time required to participate based on work with other schools. Given the issues experienced in Victoria with COVID, schools have found it difficult to focus on any time commitments or planning for future activities in this space.
- We will invite principals to participate in this project. Once a school agrees to participate, we will forward a template of further communication about our research so that the school can help us to reach potential interview participants (parents of students who are newly enrolled in 2020 and 2021).

4. Measuring the success of the project:

- Before diving into recruiting and interviewing participants, we intend to first trial our interview questions by organising pilot interviews with internal members of ISV. The purpose of the internal interviews is to refine the interview process and to ensure that relevant insights are captured to address our research questions. Once again, this work has been planned and questions developed but interrupted by frequent lockdowns in Victoria.
- We are also trying to adopt a systematic way of capturing qualitative data by using a discussion guide that we developed to maximise consistency. The interviews will also be recorded and transcribed so that we can go back to the original conversations during our analysis process.

Project title: LLtM (Leading Learning that Matters) Masters Mentoring Project

1. Overall summary of the project's progress:

The project is still in its early stages in determining how best to support the principals of the schools identified. Many of the principals are relatively new to the role and will be experiencing significant challenges in their roles. Some of the issues identified that they are likely to face include:

- How to be strategic but still deal with the immediate
- How to do more with less, be 'lean and mean'
- Possible strategies school might use to decrease costs
- Access to quality professional learning, both for the Principal and staff, for rural schools
- Principal wellbeing, especially in challenging times

2. Activities and initiatives undertaken in 2020:

The project commenced in 2021 and has identified the suite of leadership programs offered by ISV and other bodies, linked with the work of the ISV school improvement team to support member schools. The project team is currently determining the best way to support the principals of those schools identified for assistance under the Choice and Affordability Fund (CAF), both through these programs and in addition to them. There is a process by which schools will have input into planning to ensure that the approach suits their school.

3. Schools targeted:

The schools to be targeted are currently under consideration, although these will be from those schools identified for assistance under the CAF.

4. Measuring the success of the project:

The project has identified several highly experienced past principals who are willing to mentor current principals as part of this project. The wellbeing and effectiveness of the principals offered support will be an important indicator of the project's success. ISV will use its relationship with an existing EAP which provides support to our Principals by agreement with the Association, to support this work including production of an exception report on Principal wellbeing measures.

2. 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

In our work plan, we referred to ISV's development of 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.

Our work plan listed a number of 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.

ISV established a number of project teams to lead this work. Due to the challenges faced by schools and ISV in 2020 (as a result of the COVID-19 pandemic and the particular circumstances in Victoria) and given that ISV's work plan wasn't finalised until late July, some of the projects didn't get started until 2021.

The following is a progress report on each project.

Project title: Data-Informed School Assessment Tool

1. Overall summary of the project's progress:

ISV is currently developing the Data-Informed School Assessment Tool (DISAT), a tool that brings a range of data together to assess the performance of schools across various domains. The aim of the project is to identify warning signs of schools that may be struggling, so that targeted assistance can be provided in a timely manner. The DISAT will also be used to prioritise schools' access to other elements of the Victorian Independent sector's CAF projects.

2. Activities and initiatives undertaken in 2020:

In 2020, ISV worked to build a centralised data warehouse that brings together the wide range of data available about schools in the sector. Work also commenced to link the data warehouse to data analysis and benchmarking tools.

In 2020, ISV signed a licensing agreement with an American company, Attain LLC, to calculate and implement the Composite Financial Index (CFI) in Australian schools. The CFI is a tool that establishes the financial capacity of not-for-profit organisations to respond to economic shocks. This agreement notes that ISV will need to significantly change the CFI tool given the dependence on government support experienced by Australian not for profit operators, including schools.

In 2021, ISV is working to bring together the various data used to populate the DISAT, and to develop an analysis framework to assess these data.

3. Schools targeted:

No schools have yet been targeted.

4. Measuring the success of the project:

No measures of success have yet been established. However, measures of success are likely to include:

- The establishment of composite indices to assess school performance
- The provision of recommendations to other CAF projects regarding schools requiring targeted support
- Schools accessing and using the DISAT to drive their own continual improvement projects.

Project title: Values & Agile Strategy

1. Overall summary of the project's progress:

In 2020, scoping the project was well underway until the Victorian COVID-19 lockdowns due disrupted our progress. Momentum was regained towards the end of the year and a clear plan of action and service delivery model for the Values & Agile Strategy project was finalised in 2021.

2. Activities and initiatives undertaken in 2020:

As mentioned above, progress was stalled during 2020. However, the following progress has been made in 2021:

- ISV staff project team has been formed, and numerous sessions have been held to develop a plan of action.
- ISV staff have engaged with school principals/leadership teams to understand school needs and expectations.
- ISV staff have collaborated with external consultancy EnRusk to develop training modules for the program.
- Delivery of Program Plan has been finalised, three modules have been developed and specific services for schools have been determined.

3. Schools targeted:

This is still to be determined. But those schools who express an interest in the work, who are on the CAF target list, will be prioritised.

4. Measuring the success of the project:

No measures of success have yet been established. However, measures of success are likely to include:

- School engagement and feedback
- Schools will better articulate who they are, what they believe in and understand the tenets behind every decision their school makes
- Create an Agile plan that inspires everyone and increases school engagement with leadership and school vision
- Self-organisation, resilience and fluidity increase across the whole school
- Upon completion of initial delivery, ISV will explore co-facilitation to lead delivery.

Project title: innovationXdesign

1. Overall summary of the project's progress:

- The first iteration has commenced
- Resources have been created specifically for use by Victorian independent schools and will be used for future iterations
- Once the first iteration has been completed, the program will be run by ISV staff

2. Activities and initiatives undertaken in 2020:

- innovationXdesign did not start until May 2021 (but significant progress is being made during 2021)

3. Schools participating:

- Haileybury, Trinity Grammar School, Kew, Yarra Valley Grammar and Balcombe Grammar are participating in the first iteration. The program is available for all Victorian independent schools.

4. Measuring the success of the project:

No measures of success have yet been established. However, measures of success are likely to include:

- The number of schools willing to participate (we were initially looking for 3 schools to participate. We received expressions of interest from 4 and may sign up another before the 2nd session)
- Continued interest from schools – we will look for a minimum of three schools per iteration
- Schools implementing the innovationXdesign process in a variety of contexts after participation

Project title: Training modules - Governance, Compliance, Employment Relations

1. Overall summary of the project's progress:

The project didn't commence until April 2021 but is expected to be completed by the end of 2021.

The following tasks have been identified to be completed with the main task to create new training materials, pilot these in schools and receive feedback to drive the next stage of development in 2022:

- Outline amplification of existing learning events and training
- Creation of master courses in isLearn which can be adapted to a variety of areas
- Development of at least three prototype courses for schools to trial in a pilot program
- Analysis of pilot program
- Recommended program for future development of materials/events
- Proposed partnerships to strengthen ISV offering and depth of customised training to support school needs
- Roadmap of isComply, isLearn and isConnect to increase visibility and access to services when schools need them

2. Activities and initiatives undertaken in 2020:

As mentioned above, the project didn't commence until April 2021.

3. Schools targeted:

There won't be any specific targeting of schools as the modules will be available for all Victorian independent schools. We will pilot with those schools who express an interest with priority given to the most disadvantaged of the CAF schools.

4. Measuring the success of the project:

The success of the project will be measured by:

- The development of prototype training courses
- The running of a pilot program where schools trial the prototypes
- The type of feedback gathered to inform the next stage of development
- The usability of isLearn and its connections to isComply and isConnect. This will allow schools to have 24/7 access to the support they need.

Project Title: Employment Relations Service Provision

1. Overall summary of the project's progress:

The project team has been reviewing the current resources available through ISV, which includes a major workplace change guide, flowchart and template letters. This stage of the project encompasses the strategic review of the business model and cost drivers at CAF schools.

To supplement these resources, it is proposed that ISV provide a more comprehensive advisory service that can assist and 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.

In the context of this project, it is assumed that a School is considering restructuring its services because there is an imperative, often financial, to redefine and review the School's services and educational offerings to ensure that it remains financially viable and will be sustainable in the longer term.

The Team will continue to refine the proposed expansion of the ER advisory service and will also examine whether there are opportunities to include other parts of ISV, such as the School Improvement Team, as part of this strategic review process.

2. Activities and initiatives undertaken in 2020:

This project didn't commence until 2021 but has since made significant progress, as outlined above.

3. Schools targeted:

This project will assist all schools but in future phases we plan to target those schools that have been adversely affected by the new Direct Measure of Income funding arrangements. We will target and prioritise the most impacted CAF schools in the first instance. Schools will have to self-nominate in order for us to do this, i.e. they have self-determination.

4. Measuring the success of the project:

The success of the project will be measured by:

Measures of success will include assessing uptake of the new service model and measuring the use of ER resources which are related to managing major workplace change. This can be assessed by reviewing the usage data for isConnect.

The ER team logs all contact points with Schools through the CRM system. This enables us to assess the number of queries which are related to major workplace change and to compare this data with queries related to other ER topics.

Project title: Deep Dive Professional Learning

1. Overall summary of the project's progress

The project commenced in March 2021. The main focus of this project is to work with a small number of pilot schools from the list of schools identified for assistance under the CAF and to help them develop a customised model that would be an appropriate whole school approach to their

Professional Learning. In the initial stages, participating schools will complete an audit of their current PL Program(s).

2. Activities and initiatives undertaken in 2020:

This project didn't commence until 2021 but has since made good progress, as outlined above.

3. Schools targeted:

ISV will invite Penleigh and Essendon Grammar School, Goulburn Valley Grammar and Gippsland Grammar to participate as pilot schools.

4. Measuring the success of the project:

The project team hasn't yet described success measures. However, success measures could include:

- Each of the three 'targeted' pilot schools agrees to participate
- An informative audit of the current PL program(s) operating in each of the pilot schools
- The opportunity to work collaboratively, both on-site and online, in Terms 3 and 4 2021 with a small team of leaders in each pilot school
- Before the end of 2021, the development of a model that is a whole school approach to PL for each of the three pilot schools that is customised to each of their contexts
- The whole school PL model implemented in each pilot school from January 2022
- Other Member Schools sign up for the 'Deep Dive PL' Project in 2022

3. Initiative/activity: Special circumstances funding

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

In our work plan, we referred to ISV using 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.

Project title: Special Circumstances Funding Allocation Project

1. Overall summary of the project's progress

No actions were taken in 2020 as part of this project. ISV is currently in the planning stages of the project.

2. Activities and initiatives undertaken in 2020:

Research has shown that students, staff and school communities can take a long time to recover from the experience of a disaster. In particular, both student learning and wellbeing can take many years to recover from the emotional impact.

ISV is currently planning the implementation of our special circumstances project in schools. Our strategy is focused on identifying the most appropriate supports for schools in three stages:

- building resilience in students, staff and school communities prior to a disaster occurring
- providing immediate, short-term assistance to schools going through a disaster
- providing long-term assistance to schools that are recovering from a previous disaster.
- It is also focused on providing support to sustain:
 - student learning and wellbeing,
 - staff wellbeing
 - school leadership's capacity during times of disaster.

As part of this strategy, ISV is undertaking research into the supports that are most useful, practical and beneficial to build resilience in school communities and to support student learning in all three stages. This includes speaking to schools that have previously experienced disasters, speaking to educational experts, undertaking literature reviews, and building connections with key service providers that can be called upon during these times.

ISV intends to use the Choice and Affordability Funding for the following purposes:

- We will develop a bank of resources and supports that all schools can access at their point of need – either before, during or after a disaster.
- We will retain funding for direct and immediate assistance to school communities when they are hit by natural disasters.

3. Schools targeted:

While the resources will be available to all schools, there will be a particular focus on resources for schools in regional Victoria that have a significantly higher likelihood of being affected by droughts, floods and bushfires.

4. Measuring the success of the project:

No measures of success of the project have yet been established. Success measures will likely include:

- The establishment of a bank of resources available to schools
- The number of schools accessing information in this bank of resources
- The establishment of improved links between schools and allied health professionals

4. 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

In our work plan, we referred to ISV developing 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.

Our work plan listed potential actions as the development and refinement of 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.

Project title: Endeavor Initiative

The Endeavor Initiative for schools and communities will address 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. While the team would like to focus on various arts and the relationship to arts learning on broader student outcomes, ISV will also bring to bear any potential program, product or service that may be needed, and which will provide the assistance the schools require.

1. Overall summary of the project's progress

The original concept for the Endeavor Initiative was developed in late 2019. The purpose is to help students, parents and school staff overcome disadvantage caused by special circumstances. The project team met several times to discuss the original concepts, define key components of the project and to build a "thought plan" for progressing. The team visited the two pilot locations in February 2020. Shortly after that, the project was placed on hold due to COVID-19 restrictions.

The project was released from hold in March 2021 and the impact of COVID-19 has been added to the definition of special circumstances.

Immediate plans include:

- Formalising Voice of Customer (VOC) questions for interviews
- Planning, scheduling and completing VOC interviews
- Developing engagement plans for each school
- Preparing logistics and support for implementation
- Begin implementation

The overall project plan breaks our work into five core areas:

- Preparation: Plan and Investigate
- Development: Design and craft the best approach for each school
- Implementation: Provide products and services to fulfill the plan for each school and gather data and artifacts to substantiate and report on findings
- Evaluation: collect data and compare our research from pre- and post-initiative engagement and determine course corrections or enhancements
- Sustaining: documentation, teaching guides, templates, videos, etc. will be essential to help prepare school leadership and teachers to continue working with the students to sustain the gains with students directly impacted by the initiative, but also so that they can continue to use the same skills for the next group of children as they progress through school.

2. Activities and initiatives undertaken in 2020:

Members of the project team travelled to Portland and Shepparton at the end of February 2020. The purpose of the trip was to engage with school and community leadership to discuss the project concepts and verify their interest in participating. Our team held meetings with school principals and other leaders, as well as teachers. Those who participated provided the team with insights on specific areas of concern where ISV may be able to provide support. This included ideas directly related to the students, such as understanding how to give voice to the concerns they have from their experiences with the special circumstances related to their area. These discussions also helped the team to focus our discussions for a fact-finding mission that included discussions with town leadership such as the mayor and council members, the city librarian and business leaders. The findings from this trip were shared with the whole project team.

The project was placed on a temporary hold due to COVID-19 restrictions and we could not proceed in person to work with any of the schools or community associates. However, the project team leader met with other team members to brainstorm and develop ideas for project approach, and specific program needs. These conversations included details about documentation, which will include social media, research reports, training guides for students and teachers as well as mechanisms for schools to sustain the intervention once ISV is no longer on-site.

3. Schools targeted:

The pilot site schools and communities selected for the Endeavor Initiative are in Portland and Shepparton.

4. Measuring the success of the project:

The ISV research team has provided research data for the two pilot areas related to overall student outcomes, results from previous initiatives (such as Cognizance), attendance and comparative demographics. The research metrics will be updated to include the impact of COVID-19. This particular data gathering was started in 2020 to assist ISV in providing support through the COVID-19 shutdown, so our team will have information from this broader data set to help our work as we progress further into the initiative.

The initial research paper identified several key factors for measurement but the team has not finalised discussions or decisions on metrics. Some of the KPIs may not be determined until we have established the customised approach for each pilot area. However, the following are brainstormed metrics to this point, but will be reviewed and updated as we compile VOC and establish the most appropriate plan for each school:

- The number of students participating; by various factors such as by school, by age, by intervention (such as Wayfinder or Cognizance)

- Relational data such as comparing people’s responses to questions such as “what was the single biggest impact to students during 2020” such that we can compare % of participants with same responses, etc.
- Comparison of historical student outcomes to post-engagement
- Comparison of historical attendance outcomes to project engagement
- The number and type of artifacts collected by students related to using art projects during this initiative
- The number of engagements that include schools and communities as a result of this initiative
- The number of participants in school or community engagements that result from this initiative
- Qualitative data related to emotional and personal impact; satisfaction ratings, stories, examples

Project title: Project Wayfinder

Project Wayfinder was born out of Stanford University’s d.school in 2016 to address a rise in student mental health crises. The COVID-19 pandemic has caused the largest sustained interruption the Australian education system has ever seen. Prior to the pandemic, overall mental health among young people was already in a state of rapid decline. Studies have shown a steady rise in anxiety and depression among teens, as well as a rise in suicidal ideation and suicide attempts. Project Wayfinder’s two programs, Belonging and Purpose, guide students to build compassionate, meaningful relationships with themselves, other people, and the wider world, and explore who they are and what matters to them so they can purposefully navigate their life ahead. The program uses cutting-edge, academic research and draws upon practices of traditional wayfinding navigation as a metaphor for stepping into life with belonging and purpose. Project Wayfinder’s in-app assessment tools enable educators to gauge student mental and emotional well-being.

ISV has also partnered with Project Wayfinder and the Stanford Flourishing Project to deliver Making Meaning, a bespoke learning experience designed to help educators re-discover a sense of belonging and craft a purposeful life path. This program has been specifically crafted for educators after research undertaken by ISV uncovered that many were feeling indifferent, despondent and disenfranchised after a turbulent 2020.

1. Overall summary of the project’s progress:

- 49 educators trained in 2020/2021
- Belonging and Purpose curricula currently delivered to approximately 1000 students across Victoria
- Three ISV staff are fully trained to deliver Project Wayfinder programs
- ISV is one of three international joint ventures for Project Wayfinder and the only one for an entire country
- We have begun the marketing rollout of Making Meaning – a wellbeing course for educators. Delivery begins in July 2021

2. Activities and initiatives undertaken in 2020:

- Four training sessions have been delivered (2 Belonging and 2 Purpose)
- Three webinars in relation to the program have been delivered through ISV's Parents Website, a Principal Learning Forum and isLearn
- Two virtual information sessions have been held

3. Schools targeted:

We will be making the CAF schools a particular target should the schools take up our offer of assistance. Also, the first target will be the list of schools highlighted for emergency assistance.

The following Victorian independent schools have piloted the program:

- Geelong Grammar School
- Bayview College
- Melbourne Montessori School
- Bairnsdale Christian Community School
- Westbourne Grammar School
- Donvale Christian College
- Waverley Christian College
- Belgrave Heights Christian School
- Village High School
- Koonwarra Village School
- St Michael's Grammar School

4. Measuring the success of the project:

- Program feedback from students and educators has so far been positive
- Our aim is to have an increased number of schools participating in the program

Project title: Transformative Repair

This project aims to alert schools and school communities to actions that they can take within their local context to support changes in their business model and approach. A core outcome will be for schools and their communities to understand that financial "shock" does not have to mean dilution of programs or diminution of community support.

1. Overall summary of the project's progress:

The Transformative Repair project was originally intended to begin in October 2020 but the start date was delayed to April 2021. Since the project went live, we have worked on an intensive literature review to understand the cognitive, emotional and social demands of transformative repair, and have discussed conceptual bases of transformative repair, clarified the roles of the two teams, and discussed ways to promote and document the project on social media.

2. Activities and initiatives undertaken in 2020:

Intensive review of literature from various fields to understand the cognitive, emotional and social demands of transformative repair. To date, we have reviewed 31 sources (peer-reviewed research papers, websites, books, artists, white papers, etc.) and organized insights from the literature into five broad categories:

1. Visual art: *artistic practices; aesthetic values; intentions and motivations.*
2. Power of the collective: *collective euphoria; social comparisons; social networks; synchrony; radical imagination.*
3. Role of emotions: *awe/wonder; pro-sociality; self-transcendence.*
4. Animating symbols: *possessions; collective artworks; rituals.*
5. Identity: *narratives; self-concept; agency.*

Monthly Zoom meetings comprising the Project Zero (PZ) and ISV teams. We convened as a team for 1.5 hour meetings in May and June 2020 to discuss the conceptual bases of transformative repair, to clarify the roles of the two teams, and to discuss ways to promote and document the project on social media. More specifically:

- At the May meeting, we discussed multiple connections that could be made to the concept of “transformative repair”, interesting artists and organizations whose work could be relevant to the project, and emerging themes to guide the literature review process.
- At the June meeting, we used an artwork by Cao Fei – “Whose Utopia?” – as a provocation to brainstorm and discuss key qualities of transformative repair as well as puzzles and cautions we should pay attention to as we engage schools and students. We also discussed how we might leverage social media at critical points of the project to both promote the work on the project and document progress.

3. Schools targeted:

The project will focus on a small number of middle schools (approximately years 7-9) in educationally disadvantaged communities and regional settings. Participating schools haven't yet been identified.

4. Measuring the success of the project:

We are in the process of defining key qualities of transformative repair which will feed into our measures of success.

Summary of outcomes

Due to the COVID-19 pandemic, the severe restrictions in place for many months in Victoria made it very challenging to engage schools in the various projects and initiatives as schools were having to focus heavily on managing long periods of remote delivery to students. ISV spent more time on planning than expected in 2020 and has increased its efforts in engaging with schools in 2021. While this resulted in increased centralised expenditure during 2020, the additional work will result in reduced centralised expenditure in 2021.

The delays in project commencement meant that ISV was unable to distribute funding to schools under the Regional Transition Assistance and National Adjustment Assistance Fund elements of the Choice and Affordability Fund. Funding will be distributed in 2021 and beyond, as outlined in ISV's work plan.

| Priority ¹ | Activities/Initiatives | Budgeted ² | Spent ³ | Description of outcome against targeted priority |
|--|---|---|--|---|
| Priority as per your agreement/work plan | Activities and initiatives as per your work plan | Expenditure on the activity managed centrally by the NGRB and funding distributed to schools. | | Please provide a description of outcomes achieved against the targeted priorities and indicators of success in your Agreement/work plan |
| (a) | Helping schools understand what really matters to their community | Centralised \$113,760 Distributed \$15,799 | Centralised \$189,396 Distributed \$0 | Due to COVID-19 restrictions in Victoria, progress on this priority was significantly affected in 2020. The severe restrictions made it very challenging to engage schools in this project as they were having to focus heavily on managing long periods of remote delivery to students. ISV spent more time on planning than expected in 2020, resulting in increased centralised expenditure. This additional work will result in reduced centralised expenditure in 2021. Planning and development in 2021 is making good progress. |
| (b) | Regional Transition | Centralised \$0 | Centralised \$0 | 1. Data-Informed School Assessment Tool |

| | | | | |
|--|--|-----------------------|-----------------------|---|
| | Assistance | Distributed \$706,927 | Distributed \$0 | <ul style="list-style-type: none"> • Due to COVID-19 restrictions in Victoria, progress on this priority was significantly affected in 2020 and no schools have as yet been identified for participation. However, planning and development in 2021 is making good progress. (Please refer to COVID-related comments above in (a)) <p>2. Values & Agile Strategy</p> <ul style="list-style-type: none"> • Due to COVID-19 restrictions in Victoria, progress on this priority was significantly affected in 2020 and no schools have as yet been identified for participation. However, planning and development in 2021 is making good progress. (Please refer to COVID-related comments above in (a)) <p>3. innovationXdesign</p> <ul style="list-style-type: none"> • This project did not start until May 2021 (but significant progress is being made during 2021) • Four schools are participating <p>4. Training modules - Governance, Compliance, Employment Relations</p> <ul style="list-style-type: none"> • The project didn't commence until April 2021 but is expected to be completed by the end of 2021. • The modules will be available for all Victorian independent schools. <p>5. Employment Relations Service Provision</p> <ul style="list-style-type: none"> • This project didn't commence until 2021 but has since made significant progress • This project will assist all schools but in future phases we plan to target those |
| | National Adjustment | Centralised \$0 | Centralised \$0 | |
| | Assistance Fund | Distributed \$78,997 | Distributed \$0 | |
| | A transition plan for schools | Centralised \$108,934 | Centralised \$181,361 | |
| | to the Direct Measure of Income funding arrangements and in the wake of COVID-19 | Distributed \$444,048 | Distributed \$0 | |

| | | | | |
|-----|--|--|--|--|
| | | | | <p>schools that have been adversely affected by the new Direct Measure of Income funding arrangements.</p> <p>6. Deep Dive Professional Learning</p> <ul style="list-style-type: none"> • This project didn't commence until 2021 but has since made good progress • ISV will invite Penleigh and Essendon Grammar School, Goulburn Valley Grammar and Gippsland Grammar to participate as pilot schools. <p>ISV spent more time on planning than expected in 2020, resulting in increased centralised expenditure. This additional work will result in reduced centralised expenditure in 2021.</p> |
| (c) | Special circumstances funding | Centralised \$0 Distributed \$43,573 | Centralised \$0 Distributed \$0 | No actions were taken in 2020 but planning and development in 2021 is making good progress. |
| (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 Distributed \$129,888 | Centralised \$286,585 Distributed \$0 | <p>1. Endeavor Initiative</p> <p>Some progress was made in the early stages of 2020 (pre-COVID) and pilot schools and communities have been selected. However, the severe restrictions made it very challenging to engage schools in this project as they were having to focus heavily on managing long periods of remote delivery to students. ISV spent more time on planning than expected in 2020, resulting in increased centralised expenditure. This additional work will result in reduced</p> |

| | | | | |
|--|--|--|--|--|
| | | | | <p>centralised expenditure in 2021.</p> <p>2. Project Wayfinder</p> <ul style="list-style-type: none"> • 49 educators from eleven Victorian independent schools have been trained in 2020/2021 • Belonging and Purpose curricula currently delivered to approximately 1000 students across Victoria • Three ISV staff are fully trained to deliver Project Wayfinder programs • One of three international joint ventures for Project Wayfinder and the only one for an entire country • Have begun the marketing rollout of Making Meaning – a wellbeing course for educators. Delivery begins in July 2021 • Program feedback from students and educators has so far been positive <p>3. Transformative Repair</p> <ul style="list-style-type: none"> • This project didn't commence until 2021 but has since made significant progress • The project will focus on a small number of middle schools (approximately years 7-9) in educationally disadvantaged communities and regional settings. Participating schools haven't yet been identified. <p>ISV spent more time on planning than expected in 2020, resulting in increased centralised expenditure. This additional work will result in reduced centralised expenditure in 2021.</p> |
|--|--|--|--|--|

| | | | | | |
|----------------------|--|-------------|-----------|--|--|
| | | | | | |
| Administrative costs | | \$169,926 | \$13,415 | | |
| TOTAL | | \$1,983,988 | \$670,757 | | |