
Choice and Affordability Fund

Annual Report 2021

Independent Schools Victoria

Summary of 2021

ISV's project teams continued to progress the various initiatives and activities under the Choice and Affordability Fund. The ongoing challenges in Victoria throughout 2021, because of the COVID-19 pandemic, meant that a number of initiatives didn't progress as much as expected. We found that even though schools were willing to engage with ISV's project teams, their capacity to fully participate was extremely limited. As a result, ISV continued to work on the background development of many initiatives so they will be ready when schools are able to commit to them.

Whilst this report is in relation to activity during the 2021 calendar year, it is worth noting that significant progress has been made in 2022 (despite further challenges faced by schools because of COVID-19 and influenza) and this will be reported in next year's annual report.

Most of the initiatives and activities have been made available for all Victorian independent schools represented by ISV. The exceptions to this were the direct allocations of transition funding to those schools deemed eligible to receive such allocations.

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

Priority: (a) Choice and affordability of schools

In our 2020-21 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.

ISV established a number of project teams to lead this work. Due to the continuing challenges faced by schools and ISV in 2021 because of the COVID-19 pandemic, some of the projects didn't progress as much as expected during 2021.

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

1. The initial phase of the project involves a detailed research study to determine the factors that matter for parents when choosing an independent school. The majority of activity over the reporting period has been associated with this aspect of the project.
2. In early 2022 we commenced the recruitment of parents into the study through launching an Expression of Interest campaign across targeted schools.
3. The LLtM Mentoring Project is still in its early stages, although work has commenced with at least one regional school.

2. 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

In our 2020-21 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 and we established project teams to lead this work. Due to the continuing challenges faced by schools and ISV in 2021 (because of the COVID-19 pandemic), some of the projects didn't progress as much as expected during 2021.

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

1. Transition assistance for schools that would have been eligible for the former National Adjustment Assistance Fund

During the latter stages of 2021, ISV began to work with nominated schools in the development of a 'Transition Plan' for each school. Schools were asked to consider their viability and business model into the future. These

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plans are being used by schools and ISV in identifying the types of support that could be provided by ISV to deliver the transition process.

ISV will provide transition funding to the eleven schools eligible under the former National Adjustment Assistance Fund (NAAF). Each school will receive annual direct grants, based on a formula designed to ensure an equitable allocation for each of the eleven schools.

2. Transition assistance for regional schools

During the second half of 2021, ISV began to work with the twelve nominated regional schools in the development of a 'Transition Plan' for each school. Following on from meetings with each school, they were asked to consider their viability and business model into the future via a 'sustainability plan'. These plans are being used by schools and ISV in identifying the types of support that could be provided by ISV to assist with the transition process.

ISV will provide transition funding to the twelve regional schools that have been nominated by the Australian government. Each school will receive annual direct grants, based on a formula designed to ensure an equitable allocation for each of the twelve schools.

3. Transition for other schools

During the latter stages of 2021, ISV identified twenty-eight schools expected to experience reduced government funding as a result of the move to the DMI funding methodology compared to the former SES funding methodology. ISV deemed these schools as meeting eligibility criteria for Transition Assistance and began to work with them in the development of a 'Transition Plan' for each school. Schools were asked to consider their viability and business model into the future. These plans are being used by schools and ISV in identifying the types of support that could be provided by ISV to deliver the transition process.

ISV will offer transition funding to these twenty-eight schools via annual direct grants, based on a formula designed to ensure an equitable allocation for each of the schools.

4. Data-Informed School Assessment Tool

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

The application 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.

Much of the work completed in 2021 relates to three areas:

1. The design of the application and the metrics that will populate the Data-Informed School Assessment Tool
2. The procurement of technological tools to deliver the application and the development of back-end services, infrastructure, and processes to deliver the service to schools
3. The collating and cleaning of various data sets required to produce the relevant metrics that sit behind the application.

5. Composite Financial Index

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. It will be employed as a simple way to consistently measure the financial viability of the school.

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.

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Over the reporting period we completed the following activities to deliver the CFI to schools:

- Worked with Financial experts to develop a CFI system that is fit for purpose for Australian independent schools.
- Tested the CFI metrics using data from a select number of Victorian independent schools
- Scoped and procured the relevant technical tools to support the online development of the application.

6. Values & Agile Strategy

This project aims to help schools understand and clearly articulate who they are and what they believe in by supporting schools to explore the tenets and values behind every decision a school makes. It is designed to support schools to collect evidence of the values that guide them to drive a strong sense of purpose, direction, and culture.

A year long Values & Vision program has been designed and resources and tools for schools have been developed. Also, ISV staff members have been trained for coaching and mentoring purposes.

7. innovationXdesign

ISV has developed a coherent and adaptive approach to innovation, known as innovationXdesign. It brings together world class processes, strategies and tools that have been created and adapted to the context of Victorian independent schools.

Overall summary of the project's progress:

- Two iterations were completed in 2021 and a third iteration will run from April to June 2022.
- Initial resources have been created and updated specifically for use by Victorian independent schools. These will be used for future iterations.
- The Program will be delivered by ISV staff from the third iteration onwards.

8. Governance, Compliance, Employment Relations

ISV has developed a series of interactive, self-paced online learning modules on occupational health and safety in the independent school sector.

Due to the challenges faced by schools and ISV in 2021 (because of the COVID-19 pandemic and the particular circumstances in Victoria) the first module wasn't released until November 2021. The second module was released in December 2021 and the third in March 2022.

The development of additional modules will continue in the first half of 2022, with the project expected to be completed by July 2022.

ISV will use the measures of success to develop additional online learning modules on other compliance and governance topics over the coming years.

9. Employment Relations Service Provision

This project aims to supplement the resources and advice that the ISV Employment Relations Team already provides in the area of workplace change. It is proposed that ISV provides 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.

Due to challenges caused by the COVID-19 disruptions in Victoria, this project was significantly delayed in 2021. Progress is being made, however, in 2022.

10. Deep Dive Professional Learning

The roll-out of this project has been hindered by the COVID-19 pandemic, but a lot of preparation work has been completed. The project leader has conducted numerous individual interviews with Professional Learning Co-ordinators from schools with established, effective whole school professional learning programs for both teaching and non-teaching staff. These discussions have provided excellent information to inform programs and activities other schools might strive to implement in the future.

A survey tool has been developed and utilised in a pilot school.

3. Activity/Initiative: Special circumstances funding

Priority: (c) Special circumstances funding

In 2021, Independent Schools Victoria (ISV) undertook two activities under this initiative:

- Grants of \$10,000 were provided to eight Victorian Independent schools to assist with deep cleaning associated with the COVID-19 pandemic
- An application form and assessment rubric were developed for any future applications from schools. Both documents have been made available to Victorian Independent schools.

4. 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

In our 2020-21 work plan, we referred to ISV developing a program 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.

Due to the continuing challenges faced by schools and ISV in 2021 (because of the COVID-19 pandemic), some of the projects didn't progress as much as expected during 2021.

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

1. Endeavor Initiative

The Endeavor initiative for schools and communities addresses the core of wellbeing issues in students, schools and their respective communities. 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.

Due to COVID-19 restrictions and related issues challenging schools in 2021, this project was on hold for most of 2021 in regards to direct work with the schools. However, the team began to hold meetings again as of June 2021 in order to brainstorm how the project might progress virtually. Several activities were undertaken within the team to prepare for implementation in the schools and the community as soon as the environment allowed.

Unfortunately, by the end of October 2021, the project was again placed on hold.

Activities resumed again to move the project forward in late April 2022.

2. Project Wayfinder

Project Wayfinder was born out of Stanford University's d.school in 2016 to address a rise in student mental health crises. 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.

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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 is currently undergoing iteration and will be relaunched in the second half of 2022. We are working with the Wayfinder team in the US to prototype a structure that works for all educators.

Overall summary of the project's progress:

- Over 60 educators have been trained in 2021/2022
- Belonging and Purpose curricula is currently being delivered to approximately 4000 students
- Three ISV staff are fully trained to deliver Project Wayfinder programs
- We are also offering 'Wayfinder Essentials', which includes the Waypoints Assessment Tool and educator access to the Wayfinder Activity Library. The reduced cost of this offering (and softer touch) allows a greater number of schools to undertake the program in a different format.

Activities and initiatives undertaken in 2021/2022:

- Six multi-school online training sessions were delivered (Belonging and Purpose are completed together on one day)
- Online training for whole school groups has been delivered to five schools
- In-school training has been delivered to three schools.

3. Transformative Repair

The project team continued to research how participating in artistic repair of damage contributes to the cognitive, emotional and social development of individuals and groups. With the findings, we have created a pilot program (i.e., Explore-Transform-Storify) with supporting resources that teachers can easily use in their classroom. The resources are designed to be used across the curriculum, rather than only in the art classroom. They are also designed to be flexibly used by teachers to target different ability levels, contexts, and pedagogical purpose.

The program and resources are currently in the process of being piloted in two schools that have expressed an interest in using them to support staff and students' wellbeing.

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Financial Report

2021 Budgeted Funding and Actual Expenditure

Expenditure for 2021 by activity is outlined in the table below. Expenditure for 2021 by school is outlined in *Attachment A – CAF 2021 School Level Data Report*.

Activities/Initiatives	Expenditure type	Budgeted for 2021	Actual Spend in 2021
<u>A – Choice and Affordability</u>			
<i>Helping schools understand what really matters to their community</i>	Centralised	100,775	586,072
	Distributed	56,434	-
<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</i>	Centralised	104,250	50,973
	Distributed	701,955	-
<i>Transition assistance for schools that would have been eligible for the former National Adjustment Assistance Fund</i>	Centralised		50,973
	Distributed	105,814	-
<i>Transition assistance for regional schools</i>	Centralised		101,945
	Distributed	1,165,884	-
Total for Priority B	Centralised	104,250	203,891
	Distributed	1,973,653	-
<u>C – Special Circumstances Funding</u>			
<i>Special Circumstances Funding</i>	Centralised		-
	Distributed	173,750	80,000
<u>E – Student wellbeing and support</u>			
<i>How can we have a positive impact on student wellbeing and equip students to creatively face the challenges of the future?</i>	Centralised	381,358	753,075
	Distributed	201,585	-
	Administrative costs	175,704	32,461
	Total expenditure	3,167,509	1,655,498
	Deferred funding	12,130,004	7,095,704

Interest earned that is being carried forward to 2022

Interest earned but not spent since last annual report	\$98,097
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Schools' Use of Distributed CAF Funding

Independent Schools Victoria confirms that it has met its obligation under section 49 of the CAF Guidelines that requires non-government schools to certify that distributed funding has been used for the purposes it was provided.

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Expenditure Profile for 2022–2029

This table reflects the NGRB’s planned expenditure over 2022 to 2029 consistent with its CAF Agreement and, where applicable, its CAF Work Plan, with any variations outlined below.

	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	\$14,921,260							
Accrued interest earned on funds held in 2020 and 2021 to be carried forward to 2022	\$98,097							
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	\$19,608,076
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	\$4,608,205	\$3,347,607	\$2,021,440	\$618,910	\$0	\$0	\$0	
Accrued deferred funding from the relevant year and previous years to be spent in a future year	\$19,627,562	\$22,975,169	\$24,996,609	\$25,615,519	\$21,964,396	\$16,458,508	\$8,522,314	

Note: Funding over 2026 to 2029 is indicative and will be finalised through 2026-2029 Work Plan to be settled in 2025.

Activity Report

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

Activity Description

In our 2020-21 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 continuing challenges faced by schools and ISV in 2021 because of the COVID-19 pandemic, some of the projects didn't progress as much as expected during 2021.

The following is a progress report on each project.

Project: What Really Matters

Activity Description

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 initial phase of the project involves a detailed research study to determine the factors that matter for parents when choosing an independent school. The majority of activity over the reporting period has been associated with this aspect of the project.

The research study asks CAF identified schools to invite parents who have made the decision to enrol their child/children within the last 12 months, to volunteer to participate in a confidential interview process, irrespective of whether they have already commenced at the school. The following questions will be addressed during the interviews:

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?

Over the reporting period, the following activities have been completed in relation to the research phase of the project:

- Considered the ethical concerns of the project and developed the necessary collateral to ensure participant safety throughout the study
- Completed a detailed literature review to frame the study and inform the research and interview questions
- Developed interview questions for in-depth parent interviews

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- Conducted a round of five pilot interview sessions with parents to test our methodology, the validity of the research questions and interview data
- Finalised participant recruitment strategies.

In early 2022, we commenced the recruitment of parents into the study through launching an Expression of Interest campaign across targeted schools.

Outcomes Achieved

Outcomes	Indicators of success
The first of the deliverable outcomes of this project (the number of schools participating in the research study) will be delivered during the next reporting phase. The other identified deliverables will flow from the research study in 2023 and beyond.	

Risk Management

Risk	How the risk will be managed
Active and positive participation of parents in research project	<p>There are two possibilities we are monitoring in relation to this risk:</p> <p>Identified schools not wanting to engage with the research component of this study: To mitigate against this we are liaising directly with schools to determine their interest in participating and creating documentation that outlines the rationale for the study and the benefits to participating for schools.</p> <p>Ethical concerns of participants: To mitigate this risk we have gone through an internal ethics process to ensure that we are as transparent as possible to prospective parents and that we are safeguarding their safety, both physically and psychologically, while they participate in the program. This includes having multiple research project members present during interviews, collecting active consent from parents and explaining the benefits of their participation in the research.</p>
COVID-19 outbreaks	<p>There is a risk that the research study could be further delayed by COVID-19 outbreaks, or that participants will be uncomfortable in meeting with research staff due to the possibility of contracting COVID-19. We are mitigating against this by conducting interviews online therefore minimising the potential spread of COVID-19.</p>

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Key stakeholders

Stakeholder	Engagement Work
Participating schools and their parents	The project team is developing an expression of interest form for potential parents who will participate in the study and also a series of documents that address ethical concerns. The project team includes former principals who will engage with target schools to determine their interest in the project.

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

Activity Description

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.

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 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.

The project is still in its early stages, although work has commenced with at least one regional school. In addition, a number of schools are involved in ISV professional learning programs. Some of the issues identified that participating principals 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 schools might use to decrease costs
- Access to quality professional learning, both for the principal and staff, for rural and regional schools
- Principal wellbeing, especially in challenging times.

Due to the continuing challenges faced by schools and ISV in 2021 because of the COVID-19 pandemic, this project didn't progress as much as expected during 2021.

Outcomes Achieved

Outcomes	Indicators of success
Provision of increased support for Principals to better lead their schools	Improved capacity and confidence of Principals to lead their schools as measured by opinion surveys of participating Principals (these surveys haven't yet been conducted)

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Risk Management

Risk	How the risk will be managed
A lack of engagement and participation from Principals	ISV uses a team of experienced former Principals to work closely with current Principals

Key stakeholders

Stakeholder	Engagement Work
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

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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

Activity Description

In our 2020-21 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 and we established project teams to lead this work. Due to the continuing challenges faced by schools and ISV in 2021 (because of the COVID-19 pandemic), some of the projects didn’t progress as much as expected during 2021.

The following is a progress report on each project.

Project: Transition assistance for schools that would have been eligible for the former National Adjustment Assistance Fund

Activity Description

During the latter stages of 2021, ISV began to work with nominated schools in the development of a 'Transition Plan' for each school. Schools were asked to consider their viability and business model into the future. These plans are being used by schools and ISV in identifying the types of support that could be provided by ISV to deliver the transition process.

ISV will provide transition funding to the eleven schools eligible under the former National Adjustment Assistance Fund (NAAF). Each school will receive annual direct grants, based on a formula designed to ensure an equitable allocation for each of the eleven schools.

Schools have been reminded that the transition assistance funding must be used to assist with the transition to their new funding entitlement under the DMI model. It has also been explained to schools that there will be annual reporting obligations to ISV.

Ongoing challenges in 2021 due to COVID-19 disruptions resulted in these schools not being able to access funding until 2022. However, as will be reported in the 2022 annual report, significant progress has been made in 2022.

Outcomes Achieved

Outcomes	Indicators of success
Transition assistance being provided to the eleven schools that would have been eligible for the former National Adjustment Assistance Fund	The process for allocating assistance was finalised in the latter stages of 2021. Formal agreements with schools have progressively been made in 2022 and while no direct grants were made to schools during 2021, significant progress has been made in 2022.

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Risk Management

Risk	How the risk will be managed
Delays in providing transition assistance to eligible schools due to COVID-19 disruptions	Funding was forward allocated into 2022 and direct follow up with schools occurred in 2022 when schools were better able to focus their attention on non-COVID-19 matters
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

Key stakeholders

Stakeholder	Engagement Work
Schools that would have been eligible for the former National Adjustment Assistance Fund 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.	Formal communication occurred in late 2021. Direct follow up and meetings regularly occurred in 2022 to ensure that eligible schools are able to access transition assistance

Project: Transition assistance for regional schools

Activity Description

During the second half of 2021, ISV began to work with the twelve nominated regional schools in the development of a 'Transition Plan' for each school. Following on from meetings with each school, they were asked to consider their viability and business model into the future via a 'sustainability plan'. These plans are being used by schools and ISV in identifying the types of support that could be provided by ISV to assist with the transition process.

ISV will provide transition funding to the twelve regional schools that have been nominated by the Australian government. Each school will receive annual direct grants, based on a formula designed to ensure an equitable allocation for each of the twelve schools.

Schools have been reminded that the transition assistance funding must be used to assist with the transition to their new funding entitlement under the DMI model. It has also been explained to schools that there will be annual reporting obligations to ISV.

Ongoing challenges in 2021 due to COVID-19 disruptions resulted in these schools not being able to access funding until 2022. However, as will be reported in the 2022 annual report, all schools will have received their funding allocation during 2022.

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Outcomes Achieved

Outcomes	Indicators of success
Transition assistance being provided to the twelve regional schools that have been nominated by the Australian government	The process for allocating assistance was finalised in the latter stages of 2021. Formal agreements with schools have progressively been made and while no direct funding allocations were made to schools during 2021, all schools will have received their allocation during 2022.

Risk Management

Risk	How the risk will be managed
Delays in providing transition assistance to eligible schools due to COVID-19 disruptions	Funding was forward allocated into 2022 and direct follow up with schools was occurring in 2022 when schools were better able to focus their attention on non-COVID-19 matters
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

Key stakeholders

Stakeholder	Engagement Work
Schools that would have been nominated by the Australian government to receive regional transition assistance 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.	Meetings with each individual school occurred in late 2021. Direct follow up and meetings have regularly occurred during 2022 to ensure that eligible schools are able to access regional transition assistance

Project: Transition for other schools

Activity Description

During the latter stages of 2021, ISV identified twenty-eight schools expected to experience reduced government funding as a result of the move to the DMI funding methodology compared to the former SES funding methodology. ISV deemed these schools as meeting eligibility criteria for Transition Assistance and began to work with each school in the development of a 'Transition Plan'. Schools were asked to consider their viability and business model into the future. These plans are being used by schools and ISV in identifying the types of support that could be provided by ISV to deliver the transition process.

ISV will offer transition funding to these twenty-eight schools via annual direct grants, based on a formula designed to ensure an equitable allocation for each of the schools.

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Schools have been reminded that the transition assistance funding must be used to assist with the transition to their new funding entitlement under DMI model. It has also been explained to schools that there will be annual reporting obligations to ISV.

Ongoing challenges in 2021 due to COVID-19 disruptions resulted in these schools not being able to access funding until 2022. However, as will be reported in the 2022 annual report, significant progress has been made in 2022.

Outcomes Achieved

Outcomes	Indicators of success
Transition assistance being offered to the twenty-eight schools that have been deemed as meeting eligibility criteria for Transition Assistance	The process for allocating assistance was finalised in the latter stages of 2021. Formal agreements with schools have progressively been made in 2022 and while no direct grants were made to schools during 2021, significant progress has been made in 2022.

Risk Management

Risk	How the risk will be managed
Delays in providing transition assistance to eligible schools due to COVID-19 disruptions	Funding was forward allocated into 2022 and direct follow up with schools was occurring in 2022 when schools were better able to focus their attention on non-COVID-19 matters
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

Key stakeholders

Stakeholder	Engagement Work
Schools that have been deemed as meeting eligibility criteria for Transition Assistance 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.	Formal communication occurred in late 2021. Direct follow up and meetings regularly occurred during 2022 to ensure that eligible schools are able to access transition assistance

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Project: Data-Informed School Assessment Tool

Activity Description

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

The application 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.

Much of the work completed in 2021 relates to three areas:

1. The design of the application and the metrics that will populate the Data-Informed School Assessment Tool
2. The procurement of technological tools to deliver the application and the development of back-end services, infrastructure, and processes to deliver the service to schools
3. The collation and cleaning of various data sets required to produce the relevant metrics that sit behind the application.

Over the reporting period we have completed the following activities:

- Designed a sustainability matrix for schools that allows them to view their performance benchmarked against other Victorian independent schools across four quadrants of sustainability metrics.
- Scoped and procured the relevant technical tools to support the development of the application.
- Designed data collection methods, where relevant, to support the collection of metrics.
- Commenced the process of collecting and cleaning the numerous data sets required to develop the metrics to support the application.

This is significant work that will support the deliverables to come in future years from this project.

Outcomes Achieved

Outcomes	Indicators of success
Identified outcomes and deliverables from this project will begin from 2022/2023, once the relevant development and testing has occurred.	

Risk Management

Risk	How the risk will be managed
ISV’s projects are not utilised by schools	We are liaising with school leaders through our technical team processes at regular intervals to discuss their challenges and issues and to talk through our solutions to assist them in maintaining the financial viability and overall sustainability of their schools.

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Key stakeholders

Stakeholder	Engagement Work
No external stakeholders were engaged during 2021 as the work was focused on internal development of the application. Once the tool is ready for use, individual schools will be the stakeholders	We will liaise directly with school leaders at regular intervals

Project: Composite Financial Index

Activity Description

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. It will be employed as a simple way to consistently measure the financial viability of the school.

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.

Over the reporting period we completed the following activities to deliver the Composite Financial Index to schools:

- Worked with Financial experts to develop a CFI system that is fit for purpose for Australian independent schools.
- Tested the CFI metrics using data from a select number of Victorian independent schools
- Scoped and procured the relevant technical tools to support the online development of the application.

The development of this application ready for testing with target schools will occur in 2022.

Outcomes Achieved

Outcomes	Indicators of success
Identified outcomes and deliverables from this project will begin from 2022/2023.	

Risk Management

Risk	How the risk will be managed
ISV's projects are not utilised by schools	We are liaising with school leaders through our technical team processes at regular intervals to discuss their challenges and issues and to talk through our solutions to assist them in maintaining the financial viability and overall sustainability of their schools.

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Key stakeholders

Stakeholder	Engagement Work
No external stakeholders were engaged during 2021 as the work was focused on internal development of the application. Once the application is ready for use, individual schools will be the stakeholders	We will liaise directly with school leaders at regular intervals

Project: Values & Agile Strategy

Activity Description

This project aims to help schools understand and clearly articulate who they are and what they believe in by supporting schools to explore the tenets and values behind every decision a school makes. It is designed to support schools to collect evidence of the values that guide them to drive a strong sense of purpose, direction, and culture.

Schools participate in a series of shared workshops and individual coaching through an agile school strategy model which involves listening with specific tools, creativity, collaboration, and communication. The tools involve talking to a variety of stakeholders including students and parents which assists schools in aligning the needs and wants of existing and prospective parents. The program has been designed to lead to change in thinking and ways of working. This project helps schools learn new processes and tools and develop a mindset of inclusiveness and continual creativity.

Outcomes Achieved

Outcomes	Indicators of success
Co-designed Values & Vision year long program to suit participating schools' needs and time frame. Provision of coaching and mentoring arranged to ensure ongoing support for schools.	Resources and tools for school use completed ISV staff members trained in program for coaching and mentoring purposes

Risk Management

Risk	How the risk will be managed
Participation of schools in these activities, particularly due to impact of COVID-19	Regular and close communication with participating schools to ensure they are willing and able to maintain participation and exploring options of completing course online if necessary.
Schools not being able to dedicate a team of 5 members for this program due to staff shortages/COVID-19 absences	Flexibility will be provided for the school to choose the number of team members and ISV staff will provide additional support via school visits and online meetings as necessary

Key stakeholders

Stakeholder	Engagement Work
<p>Participating schools and their stakeholders The Values & Vision work will involve school leadership teams engaging with their staff, students and parents to collect evidence and data of their current values and interactions to guide and improve their future work.</p> <p>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.</p>	<p>The ISV project team is in regular contact with participating schools to ensure they are on track and compiling data to inform their change initiatives</p> <p>The ISV project team consists of highly experienced former Principals and they will maintain regular contact with participating Principals</p>

Project: innovationXdesign

Activity Description

ISV has developed a coherent and adaptive approach to innovation, known as innovationXdesign. It brings together world class processes, strategies and tools that have been created and adapted to the context of Victorian independent schools.

innovationXdesign evolves best practice approaches from the world of design thinking. It leverages routines that help make thinking visible and uses our growing understanding of building sustainable change in an organisational context. It has been designed to help educators understand more about innovation practice, and to unpack the necessary mindsets, skillsets and toolsets to explore and find solutions to everyday challenges – both in and out of the classroom.

Overall summary of the project’s progress:

- Two iterations were completed in 2021, with a third iteration to run from April to June 2022.
- Initial resources have been created and updated specifically for use by Victorian independent schools and will be used for future iterations
- The Program will be delivered by ISV staff from iteration three onwards.

Six schools participated in the first and second iterations and the program is available for all Victorian independent schools.

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Outcomes Achieved

Outcomes	Indicators of success
Increased knowledge and capacity in innovationXdesign principles	<p>Measures of success are likely to include:</p> <ul style="list-style-type: none"> • The number of schools willing to participate • 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

Risk Management

Risk	How the risk will be managed
Participation of schools in these activities, particularly due to impact of COVID-19	Regular and close communication with participating schools to ensure they are willing and able to maintain participation and exploring options of completing course online if necessary.
Schools not being able to dedicate a team of 4 to 6 members for this program due to staff shortages/COVID-19 absences	Flexibility will be provided for the school to choose the number of team members

Key stakeholders

Stakeholder	Engagement Work
<p>Participating schools and Principals The activities will be developed by ISV in consultation with participating schools and principals</p>	The ISV project team is in regular contact with participating schools and Principals to ensure they are on track with their projects

Project: Training modules - Governance, Compliance, Employment Relations

Activity Description

ISV has developed a series of interactive, self-paced online learning modules on occupational health and safety in the independent school sector.

Among other things, the modules provide practical information about:

- Preventing and responding to workplace incidents
- Investigating workplace incidents
- Identifying hazards, assessing risks and implementing effective risk management controls
- Ensuring a safer work environment.

Due to the challenges faced by schools and ISV in 2021 because of the COVID-19, the first module wasn't released until November 2021. However, the second module was released in December 2021 and the third in March 2022.

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The development of additional modules will continue in the first half of 2022, with the project expected to be completed by July 2022.

Releasing modules on a regular basis has allowed participants to complete the online learning modules in their own time and at their own pace.

We have seen increasing numbers of schools participate in the training modules and accessing training materials. As at 22 March 2022, there were 39 participants enrolled.

The success of the project will be measured by:

- Feedback received from schools
- Schools continuing to enrol staff in the online learning modules
- The useability of isLearn and its connection to isComply and isConnect. This will allow schools to have access to additional resources and support.

ISV will use the measures of success to develop additional online learning modules on other compliance and governance topics over the coming years.

Outcomes Achieved

Outcomes	Indicators of success
Training materials in key areas of reform (i.e., governance, compliance and employment relations).	39 participants have enrolled in the online learning modules on occupational health and safety.

Risk Management

Risk	How the risk will be managed
Project is not utilised by schools.	ISV is providing ongoing marketing to schools to demonstrate the value of the project so that a sufficient number of participants enrol in the online learning modules.
Participation in this project is delayed due to the impact of COVID-19	Participants can complete the online learning modules in their own time and at their own pace, notwithstanding the effects of the COVID-19 pandemic. ISV is providing regular communications with participating schools to ensure they are able to complete the online learning modules.

Key stakeholders

Stakeholder	Engagement Work
Staff in Victorian independent schools	ISV is providing regular communications with schools to ensure they are able to complete the online learning modules.

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Project: Employment Relations Service Provision

Activity Description

This project aims to supplement the resources and advice that the Employment Relations Team already provides in the area of workplace change. It is proposed that ISV provides 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.

Due to challenges caused by the COVID-19 disruptions in Victoria, this project was significantly delayed in 2021.

We have established a pilot project with Girton Grammar School to review their academic positions of responsibility (PORs). There have been some delays to the start of the project, but it is anticipated that the pilot project will commence in Term 2, 2022. The Employment Relations Team will be assisting the school to review its current POR arrangements and develop a new methodology for classifying PORs. This will enable the school to evaluate the level of responsibility and duties associated with each POR and allocate the monetary and/or time allowances relative to that position. As a result of this review process, there may be a decision to alter or remove some of the existing PORs.

In the past, the Employment Relations Team would have provided advice regarding the consultation obligations which are triggered where a school has made a decision to introduce major workplace change, but we would not have been involved in the strategic planning which precedes the implementation of this kind of change. Involvement at this early stage is seen as a significant benefit of expanding our employment relations advisory service in this way.

Outcomes Achieved

Outcomes	Indicators of success
Establishment of pilot project with Girton Grammar to review their academic positions of responsibility (to commence in Term 2, 2022)	Delivery of final report (following a process of consultation with key stakeholders).

Risk Management

Risk	How the risk will be managed
Participation in this project was delayed due to the impact of COVID-19	<p>This is a demand driven activity as it relies on schools making a decision to restructure their operations. During the past two years, schools have been heavily impacted by COVID-19 and they have not been in a position to implement this kind of strategic review and change.</p> <p>The Employment Relations Team has continued to engage with schools throughout this period, including the creation of template documents to assist them in responding to COVID-19 related employment issues.</p>

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Key stakeholders

Stakeholder	Engagement Work
<p>Nominated Regional Transition Assistance Schools and other schools negatively impacted by transition to the DMI methodology</p> <p>The activity assists schools who wish to undertake a strategic review of their operations. It is assumed that where a school is considering a restructure, an underlying concern will be reviewing the school's operations to ensure that it remains financially viable.</p>	<p>We will maintain regular contact with these schools to ensure that they are aware of the enhanced Employment Relations services, helping schools wanting to undertake a strategic review of their operations or a potential restructure.</p>

Project: Deep Dive Professional Learning

Activity Description

This project aims to help achieve CAF Priority B and improve student outcomes in participating schools through a focus on a whole school approach to developing teacher practice that can ultimately benefit their whole school community. By improving teacher practice through participation in customised, differentiated and targeted professional learning, students can benefit in many ways including academically, socially and emotionally. The school community can also benefit, as improved student outcomes and performance can lead to improvements in other areas such as staff and student wellbeing, enrolments, the perception in the community of a successful school worthy of considering in the future and therefore, sustainability.

The roll-out of this project has been hindered by the COVID-19 pandemic, but a lot of preparation work has been completed. The project leader has conducted numerous individual interviews with Professional Learning Co-ordinators from schools with established, effective whole school professional learning programs for both teaching and non-teaching staff. These discussions have provided excellent information to inform programs and activities other schools might strive to implement in the future.

A survey tool has been developed and utilised in one pilot school. After being refined, the survey tool will be used to capture data on a second pilot school's current professional learning activities early in Term 2, 2022, following an initial meeting between the project team and the school's leaders to discuss the project's implementation.

Outcomes Achieved

Outcomes	Indicators of success
Support for school leaders to think strategically about their professional learning	Pilot schools have recognised the importance of having a clearly articulated and strategic whole school approach to professional learning
Discussions with school leaders that focus on their school's vision and values and strategy	School leaders have reflected on their vision and values and strategy and are considering reassessing some of them
School leaders' increased awareness of the professional learning priorities of their staff	Staff responses to the survey tool that are closely analysed and used to compile a draft report

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Risk Management

Risk	How the risk will be managed
The COVID-19 pandemic has significantly impacted the pace of delivery of the project. Schools have not prioritised planning for staff professional learning due to competing priorities, concerns over staff wellbeing and a shortage of short-term replacement teachers.	<p>Online meetings, surveys and interviews have been conducted with school leaders, Professional Learning Coordinators and for the project team.</p> <p>This mode of delivery can be used for some individual meetings in the future.</p>
Schools decline the offer to participate due to a perceived additional workload for staff during the pandemic.	After two schools declined the offer, others approached to become pilot schools had already developed a strong working relationship with a member(s) of the project team. This was effective as team member(s) already understood where the schools were at in their professional learning journey.
Even if the 'pilot projects' are considered successful, the project is then not utilised by other schools.	ISV will promote the project on a regular basis via its Communications/Marketing Team and the School Improvement Team (SIT) in their work with schools.

Key stakeholders

Stakeholder	Engagement Work
The key stakeholders are two pilot schools that were keen to develop a more strategic approach to their professional learning. They agreed to provide feedback during and after the implementation of the activity.	After the Principals of both schools met initially with the project leader to discuss the benefits and purpose of the project, further opportunities for discussion were arranged with their whole leadership teams. Staff and leadership then completed the survey tool, with compilation of the data into a report the next step.
Other stakeholders are the Professional Learning (PL) Co-ordinators interviewed about their school's strategic approach to professional learning.	These PL Co-ordinators participated in a one off individual online interview.

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

Activity Description

In 2021, Independent Schools Victoria (ISV) undertook two activities under this initiative:

- Grants of \$10,000 were provided to eight Victorian Independent schools to assist with deep cleaning associated with the COVID-19 pandemic.
- An application form and assessment rubric were developed for any future applications from schools

COVID-19 Deep Cleaning Grants

Throughout 2021, a number of schools reported to ISV that they had been ordered by the Victorian Department of Health and Human Services (DHHS) to undertake a deep clean of their site, as a result of being identified as a COVID-19 Tier One exposure site. ISV identified that these incidents would potentially meet the requirements of Special Circumstances funding if they were unexpected, and involved the closure of an entire school/campus for an extended period of time.

Schools were invited in November 2021 to request funding assistance of up to \$10,000 where they met the following criteria:

- the school had received a directive from the DHHS in either 2020 or 2021 to close, as the result of being identified as a COVID-19 Tier One Exposure Site
- as part of the closure, the school was required by DHHS to undertake a deep clean of the site
- the closure and deep clean had applied to an entire campus or school
- the closure lasted for more than three days
- the cost of obtaining the deep clean for the school was at least \$20,000.

Schools were informed that they would not be eligible to access a grant where:

- the school elected to undertake a deep clean of its own volition
- the closure only related to a portion of the school or campus (for instance a particular building or particular rooms)
- the closure and deep clean related to an early learning centre, or other, non-school operation.

Schools were also informed that where they had received multiple directives from DHHS to close and undertake a deep clean, or where a school had been required to close multiple campuses, the school would be permitted to submit multiple grant applications, provided that each separate application met all of the criteria.

ISV received 11 applications from ten Victorian schools. Eight of the applications from seven schools met the criteria. The other three applications were rejected:

- One application was received from a Catholic school and related to a deep-cleaning event that cost less than \$20,000
- One application related to multiple deep-cleaning events, each of which cost less than \$20,000
- One application only involved the closure of individual buildings and did not significantly interrupt the on-going provision of education to students.

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Special Circumstances Applications

In preparation for any future applications, ISV developed an online application process, as well as a rubric against which applications can be assessed. The rubric will assess the extent to which any application meets the following criteria:

- The application provides a clear proposal description, outlining the event, its impact and any financial difficulties that result
- The application aligns with CAF Guidelines
- The application outlines a clear and consistent business and recovery plan
- The application provides a clear and cost-effective budget
- The application outlines how the school will evaluate the impact of its recovery plan
- The application demonstrates appropriate collaboration with stakeholders and support from school leadership for the proposed project
- The application outlines timelines that can be met within both CAF guidelines and the school's business recovery plan.

Both documents have been made available to Victorian Independent schools.

No applications were received in 2021.

Outcomes Achieved

Outcomes	Indicators of success
Grants provided to seven Victorian schools to support deep-cleaning related to COVID-19 outbreaks	Grants provided to support schools affected by unanticipated, special circumstances
On-going application process established for future applications by schools. Schools advised of this process.	Application process provided to schools in advance of special circumstances.

Risk Management

Risk	How the risk will be managed
Risk that schools receive Special Circumstances funding support do not require external assistance	For deep-cleaning grants, schools were only eligible to access funding if the cost of deep cleaning was over \$20,000. For future applications, the financial impact of their special circumstances is an explicit element of the application and assessment rubric.
Risk that demand for Special Circumstances funding does not match the funding available, either because of a large number of applications, or a lack of need from schools.	ISV is developing contingency plans to ensure that we can, as far as possible, respond to need as it arises. We are also developing plans to transfer funding to other elements of the CAF if required. These plans are being continually reviewed.

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Risk	How the risk will be managed
Schools use funding for ineligible purposes (including capital)	ISV will assess all applications to ensure that all aspects are eligible for funding support, and continue to remind schools of the eligibility criteria.
Schools are unaware of Special Circumstances applications.	In addition to the original advice to schools about the funding, ISV has placed the application form on our website, and will publish regular reminders to schools. We will also pro-actively contact schools where we hear of events that may render them eligible to access support.
The process for schools to access funding is slow and cumbersome.	ISV has designed the application process explicitly with this in mind. We will also assess metrics of how long it takes schools to complete the online process.
Ineligible schools may apply for funding through ISV.	As this risk has already eventuated, ISV will ensure that future communications will specify clearly that Catholic schools that are members of ISV are not eligible to access CAF funding through ISV.

Key stakeholders

Stakeholder	Engagement Work
<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>	ISV informed all Victorian Independent schools of both the COVID-19 Deep Cleaning Grants and the on-going application process and will continue to provide information to them in a timely manner.
<p>System Authorities</p> <p>Systems may be responsible for schools that are eligible to receive funding.</p>	ISV has informed systemic authorities at the same time as we provide information to schools.
<p>Victorian Department of Education and Training</p> <p>Vic DET provides financial support for Victorian Independent schools that may cross-over with elements of the CAF.</p>	ISV ensured that funding provided for deep-cleaning grants for schools did not clash with any Victorian Government funding initiatives.

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

Activity Description

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.

We listed potential actions in our work plan 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.

Due to the continuing challenges faced by schools and ISV in 2021 (because of the COVID-19 pandemic), some of the projects didn’t progress as much as expected during 2021.

The following is a progress report on each project.

Project: Endeavor Initiative

Activity Description

The Endeavor initiative for schools and communities will address the core of wellbeing issues in students, schools and their respective communities. 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 will focus on various arts and the relationship to arts learning on broader student outcomes, ISV will also bring to bear any potential programs, products or services that may be needed, and which will provide the assistance the schools require.

Due to COVID-19 restrictions and related issues challenging schools in 2021, this project was on hold for most of 2021 regarding direct work with the schools. However, the team began to hold meetings again as of June 2021 to brainstorm how the project might progress virtually. Several activities were undertaken within the team to prepare for implementation in the schools and the community as soon as the environment allowed.

Unfortunately, by the end of October 2021, the project was again placed on hold. Activities to move the project forward resumed in late April 2022.

The original project plan was designed with a full needs assessment to be completed at the beginning of our engagement, that would drive specific and customised approaches for support of the two focus areas in regional Victoria, namely Portland and Shepparton. While both areas have had similar challenges, there are enough differences in the communities to warrant creative designs to best meet their respective areas.

The new plan established in early 2022 will be to:

- Brainstorm and identify readily available programs or activities that can be easily implemented and adapted in the schools
- Prepare materials and resources to support the programs or activities identified as above
- Create a schedule to present to the schools on the availability of programs and materials that best operate within their respective school curriculums between August and December of 2022
- Review/revise research plan and key metrics
- Begin implementation on initial programs or activities

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- Further discussions and assessments with schools for additional needs in 2023. This would include ideas for virtual support as well as blended methodologies of ISV staff onsite in both areas.
- Revisit our project plan with community leaders and identify areas for combined activities, such as a location for an arts display.
- Craft full implementation and plan for support in 2023
- Evaluate implemented activities and collect data in support of our research plan
- Capture all documentation, teaching guides, templates, videos, etc. that will be essential to help prepare school leadership and teachers who 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
- Capture activity outcomes such as stories, videos, evaluations and metrics to support implementation success.

Note: the metrics outlined in last year's report will stand as we move forward. These metrics will support our research for understanding the impact on students – their learning and wellbeing. Some of the metrics that we can report on will include: number of students by grade participating in each program or service, pre and post assessments of learning, number of artifacts collected (art projects, stories, etc.), number of instances and number of participants related to school and community engagement.

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Outcomes Achieved

Outcomes	Indicators of success
<p>Update emails were sent to school leadership in September 2021.</p> <p>The project team met to discuss ideas for virtual support possibilities or a blended model for future implementation.</p> <p>Voice of Customer (VOC) data collection plan was created and key questions developed that would assist the team in how to move forward in order to assist schools in Portland and Shepparton. The work on this plan began in June and completed in October.</p> <p>Activities were brainstormed and created by team members for short 10-minute activities and other easily implemented materials for the schools.</p> <p>In mid-2022 our team met to discuss the original approach and to creatively find ways to move forward to support the schools.</p> <p>Explored ways that other project teams may collaborate with activities which may provide additional implementation ideas for our focus areas.</p> <p>Reviewed metrics and identified the need to update our research paper due to the delays caused by COVID-19, but also to capture the effect on students and staff members.</p>	<p>Schools were still very interested in proceeding with the project, even if we couldn't actually be present in the schools until 2022.</p> <p>The sub-team was able to capture critical VOC from several teachers and staff members from Portland and reported the results back to the team.</p> <p>Two books were identified to be used for various activities: <u>Scribble Stones</u> and <u>I'm Not Just a Scribble</u>. These books will be at the heart of various teacher led activities for primary students.</p> <p>Instructions and materials were created to support 10-minute activities.</p> <p>A revised plan was begun that would allow the team to offer programs, products or services beginning in August of 2022 with the full implementation in the schools to follow at the beginning of the school term in 2023.</p> <p>Work with specific other project team leaders to find ways to build off outcomes in our respective projects that may lead to additional support for each project team, e.g., the Transformative Repair project</p>

Risk Management

COVID-19 has created many challenges for the schools and communities in Portland and Shepparton, which are the areas of focus for the Endeavor Initiative. These challenges continue to present roadblocks for the Endeavor Initiative, as far as implementation within the schools. Also, even though Victoria is moving forward and trying to normalise after the main COVID-19 events, the risk still remains that there could be additional periods of time where schools may shut down or have to operate in a hybrid manner such that the project and the products and services ISV supports may once again be placed on hold.

Our recent activities to collect VOC data from teachers and other staff held in October 2021 provided some information for the team to move forward on a needs assessment. However, the most critical feedback from this work was that the schools were still feeling overwhelmed with the various issues related to COVID-19 and the impact to the schools. The sub-team reported back to the full team during a meeting late October to review school feedback. A subsequent discussion was then held with our team sponsor to determine the best plan of action for the remainder of 2021.

Our project was again placed on hold until 2022. In April 2022 our team met to discuss how to address the risk of any future delays in the project and to identify ways we could revise our original plan of action.

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Risk	How the risk will be managed
<p>The risks to delivery approaches that could be significantly impacted by COVID-19 lockdowns, particularly where such “in-person” approaches are key elements of delivery in several of ISV’s programs or in our team’s work in the schools’ collecting data and working with staff and students.</p> <p>The risk of losing resources from our team to other initiatives or new compliance work within ISV as well as the resource needs within the schools to support this initiative</p> <p>Revising our initial approach to a new methodology that would better address the current climate and continue to promote engagement from the schools and communities in Portland and Shepparton.</p> <p>Research data and our initial area assessments may be obsolete or in need of updates due to changes related to the challenges presented by lockdowns and other issues with COVID-19.</p>	<p>Virtual or blended models of implementation were brainstormed such that our team would be able to provide support or materials that could increase the ability to provide support while minimising constraints related to in-person visits or additional stresses for the schools</p> <p>Our team continues to be supportive and engaged. Many of our team members are leaders or key staff members who work on various other initiatives to support compliance or instructional support. The project work schedules are being considered as we move forward in 2022.</p> <p>Our team has discussed and agreed on a new approach for moving forward in order to engage the schools and community by July of 2022 and provide products, programs and materials for moving forward.</p> <p>New or updated student and demographic data will have to be collected in order to establish new baselines for key indicators related to the Endeavor Initiative.</p>

Key stakeholders

Stakeholder	Engagement Work
<p>Project Team</p> <p>Portland and Shepparton school leadership</p> <p>Portland and Shepparton community leadership</p> <p>ISV staff</p>	<p>The overall project has been on hold due to COVID-19; however, the project team continues to meet on a periodic basis to discuss plans and identify actions to move forward. This includes continued conversations with the team sponsor on best approaches for support.</p> <p>Emails and conversations with schools’ leadership continues via the team sponsor, the team leaders and several of our team members. A sub-team conducted virtual VOC data collection activities with teachers and staff members in October 2021.</p> <p>The team’s immediate plan of action is to provide materials and programs the schools can begin to implement by July/August 2022. While those activities are being scheduled, we will have another sub-team re-engage with community leaders.</p>

Project: Project Wayfinder

Activity Description

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 wellbeing.

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 is currently undergoing iteration and will be relaunched in the second half of 2022. We are working with the Wayfinder team in the US to prototype a structure that works for all educators.

Overall summary of the project's progress:

- Over 60 educators have been trained in 2021/2022
- Belonging and Purpose curricula is currently delivered to approximately 4000 students
- Three ISV staff are fully trained to deliver Project Wayfinder programs
- We are also offering 'Wayfinder Essentials', which includes the Waypoints Assessment Tool and educator access to the Wayfinder Activity Library. The reduced cost of this offering (and softer touch) allows a greater number of schools to undertake the program in a different format

Activities and initiatives undertaken in 2021/2022:

- Six multi-school online training sessions were delivered (Belonging and Purpose are completed together on one day)
- Online training for whole school groups was delivered to five schools
- In-school training has been delivered to three schools

Schools targeted:

We will be making the CAF transition schools a particular target should the schools take up our offer of assistance.

The following Victorian independent schools have implemented the program:

Geelong Grammar School

Bayview College

Melbourne Montessori School

Donvale Christian College

Belgrave Heights Christian School

St Michael's Grammar School

Rosbourne School

Presbyterian Ladies' College

Youth2Industry College

David Scott School

Ivanhoe Girls' Grammar School

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Good Shepherd College

Leibler Yavneh College

Chairo Christian School

Overnewton Anglican Community College

Outcomes Achieved

Outcomes	Indicators of success
Undertaking research (including a research project throughout 2022)	Our aim is to have an increased number of schools participating in the program at the end of 2022
The Waypoints Assessment Tool provides schools with real-time results for better visibility on student wellbeing.	The Waypoints Assessment Tool will assist us in measuring program success, leading to greater marketing opportunities and increasing the program's reach

Risk Management

Risk	How the risk will be managed
Project is not utilised by schools.	ISV is providing ongoing marketing to schools to demonstrate the value of the project so that a sufficient number of participants enrol in the online learning modules.
Participation in this project is delayed due to the impact of COVID-19	Regular and close communication with participating schools to ensure they are willing and able to maintain participation and exploring options of completing course online if necessary.

Key stakeholders

Stakeholder	Engagement Work
Participating schools	The ISV project team is in regular contact with participating schools to ensure they are on track

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Project: Transformative Repair

Activity Description

The project team continued to research how participating in artistic repair of damage contributes to the cognitive, emotional and social development of individuals and groups. With the findings, we have created a pilot program (i.e., Explore-Transform-Storify) with supporting resources that teachers can easily use in their classroom. The resources are designed to be used across the curriculum, rather than only in the art classroom. They are also designed to be flexibly used by teachers to target different ability levels, contexts, and pedagogical purpose.

The program and resources are currently in the process of being piloted in two schools who have expressed an interest in using them to support staff and students' wellbeing. We are currently working with teachers from Christian College Geelong and Carey Baptist Grammar School to test the program and resources. Conversations are underway with a third school, The Knox School, to offer the program to their teachers and students.

At Christian College Geelong, we are working with Years 8-9 teachers to support their wellbeing through engagement with Transformative Repair, before offering the program to students. This is in response to the request of the school's leadership, who noted that teachers were as emotionally and socially impacted by the COVID-19 pandemic as the students. They asked that our team support the teachers first and familiarise them with the program before offering it to students. At Carey Baptist Grammar School, we are working with teacher-leaders in the Middle School, the Integrated Learning Program, and the Art Program to use the program and resources to support students' self-efficacy and resilience.

The program and resources are offered at no expense to participating schools in the pilot phase. The aim of the program is to support participants in reframing damage in their environment by using visual art to transform the damage in safe and supportive ways. In the process, participants creatively face the challenges of an uncertain future and develop a sense of belonging in and responsibility for their communities and the world. When the program is ready for mass rollout, ISV will offer it to more schools in metropolitan and regional areas. The vision is that more schools will infuse the concept of "transformative repair" in various aspects of schooling so that both teachers and students become more sensitive to damage in their environment and develop the inclination towards repair in order to contribute to their communities.

Outcomes Achieved

Outcomes	Indicators of success
Develop a sustainable program for schools and communities that addresses wellbeing issues in students.	At present, there is deep interest from participating schools, but we have not been able to pilot the program and resources in substantive ways. This is because school leaders have been respectful of teachers' capacity to take on new programs and use resources in their practice, and hence have asked to postpone the piloting of the program and resources.

Risk Management

Risk	How the risk will be managed
Schools coming out of the pandemic have been more cautious and respectful of teachers' and students' bandwidth for new programs and resources. As such, our team has not yet been able to pilot the program and resources, and collect data that will help us revise and refine the program and resources.	We have continued to engage the school leaders and teachers in conversations about the aims and anticipated outcomes of the Transformative Repair program in order to sustain their interest. We have also revised the program and materials to allow for greater flexibility and customizability in their use so that they do not feel like a heavy "lift" to teachers. In all interactions with the schools, we have emphasized choice and agency in their participation.

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Key stakeholders

Stakeholder	Engagement Work
<p>At present, three schools have been identified for the pilot phase of the project: Christian College Geelong; Carey Baptist Grammar School; and The Knox School. When the program and resources are ready for mass rollout, they will be offered to more schools across the state.</p>	<p>Our team will facilitate the program through regular conversations with the school leadership and participating teachers (in person and on Zoom), as well as offer revised and updated resources to participating teachers following data collection. We will also be available to participating teachers whenever they have questions and suggestions.</p>

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NGRB Annual Report Sign Off

This annual report is submitted in fulfillment of the annual report requirements in sections 50, 51 and 52 of the CAF Guidelines.

Name and Position of the person signing

off on behalf of the NGRB: Michelle Green, Chief Executive

Date: 30/6/22