
Choice and Affordability Fund Annual Report

2020

Independent Schools Tasmania

Choice and Affordability Fund

Independent Schools Tasmania – Annual Report 2020

Executive Summary

From 2020 to 2029 Independent Schools Tasmania (IST) agreed to utilise the *Choice and Affordability* funding to address specific challenges within the Tasmanian non-government school sector. In order to achieve this, in August – December 2020, we focussed our attentions on determining how we would provide support to our schools around 4 key aspects of the identified priorities. Specifically, in 2020 monies were allocated as follows:

Project 1: Special circumstances funding. The Choice and Affordability Fund Special Circumstances funding was allocated to support schools and students impacted by special circumstances or in priority areas such as rural, **regional** and remote locations and areas affected by drought or other natural disasters. We identified that the financial and economic impacts of COVID-19 on our schools, alongside other circumstances that may have caused our schools to require short term emergency assistance should be allocated \$100,000. This funding allocation not used.

Project 2: Strengthening outcomes for schools and educationally disadvantaged schools and students.

In order to strengthen outcomes for schools such as helping **underperforming schools improve outcomes**, and **support educationally disadvantaged schools and students**, in 2020 IST commenced a process to appoint a new Education Consultant (to commence in January 2021) to work alongside schools to support them across all aspects of academic development. It was determined that a Curriculum Consultant would need to be appointed to work within schools, as well as providing regular support and guidance via emails and through ongoing professional learning provision. A role description (RD) was developed, and a recruitment process ensued to seek a new consultant to assist schools to feel less isolated and to support educationally disadvantaged students through the provision of regular, relevant professional learning that was to be targeted to each schools' unique context.

Project 3: Student wellbeing and support.

In an attempt to enhance **student wellbeing and support** across Tasmanian Independent Schools, in 2020 IST commenced a process to appoint a new, full-time Inclusive Education Consultant to work across the state, to commence in January 2021. This new role was advertised, and a role description and business plan was developed. The Inclusive Education Consultants role was structured to encompass the provision of support to independent schools to embed inclusive practice and wellbeing initiatives within their schools. The oversight of NCCD provisions and submissions were identified as an additional component of the project. The role description for the Inclusive Education Consultant specified that they would be responsible for developing and leading school-based professional learning, and they would be required to use empirical research to underpin professional learning around the provision of inclusive practice and wellbeing within schools. The role has been designed to involve working in an instructional coaching capacity to support K-12 classroom leaders and teachers and there will be provision within the budget to provide for resources and additional professional learning opportunities, as required.

Project 4: Transition assistance. There are no Tasmanian independent schools that would have met the criteria to have access to support through the National Adjustment Assistance Fund.

The Choice and Affordability Fund will provide compulsory regional assistance for four eligible schools during their transition to the Direct Measure of Income for capacity to contribute during 2022 to 2029.

The Choice and Affordability Fund will also provide support for schools in general to transition to a new capacity to contribute model for recurrent funding although it is anticipated that very few other Tasmanian independent schools will need that support. As no support is planned for 2020 or 2021, transition assistance expenditure has been deferred.

Conclusion

The commencement of these new projects in 2020 is hoped to enable Independent Schools Tasmania (IST) to provide levels of support not currently accessible to our independent schools across the state. Moving forward into the years ahead, these initiatives will provide our school communities with invaluable and much-needed levels of support.

Progress against your agreement and/or work plan

As the CAF funding was not formally approved until 7 August 2020, limited progress was achieved towards outcomes identified in the 2020-2021 Work Plan. An outline of progress is provided in the tables below.

The distribution of funding

Please see *Attachment A – CAF Distribution Report* **Summary of budget**

Priority	Activities/Initiatives	Expenditure type	Choice and Affordability funding	
			2020	2021
	1. Special Circumstances	Centralised	-	20,000
		Distributed	-	100,000
	2. Strengthening Outcomes	Centralised	4,169	194,937
		Distributed	-	-
	3. Student Wellbeing	Centralised	4,170	194,937
		Distributed	-	-
	4. Transition Assistance	Centralised	-	20,000
		Distributed	-	-
Administrative costs			5,000	20,000
TOTAL			\$13,339	\$549,874

		2021			
	P1	P2	P3	P4	Total
Admin	5,000	5,000	5,000	5,000	20,000
Consultants		128,260	128,260		256,520
Senior EC		16,677	16,677		33,354
PD-Resources-Travel etc	20,000	50,000	50,000	20,000	140,000
	25,000	199,937	199,937	25,000	449,874

NGRB Expenditure Profile

Expenditure	2020	2021	2022	2023	2024	2025	2026	2027	2028	2029
Carry forward		1,055,002	1,605,400	1,674,407	1,411,599	1,155,553	906,362	664,114	456,897	221,233
Allocation to IST	1,068,225	1,100,272	1,133,280	1,167,280	1,202,296	1,238,366	1,275,516	1,313,782	1,353,196	1,393,792
Central	13,339	449,874	465,170	830,985	859,239	888,454	918,661	921,896	989,757	1,015,924
Distributed	-	100,000	599,103	599,103	599,103	599,103	599,103	599,103	599,103	599,101
Total	13,339	549,874	1,064,273	1,430,088	1,458,342	1,487,557	1,517,764	1,520,999	1,588,860	1,615,025
Deferred + interest	1,055,002	1,605,400	1,674,407	1,411,599	1,155,553	906,362	664,114	456,897	221,233	0
Interest 2020	\$ 116									

Regional Transition Assistance 10-year profile and rationale for the expenditure of funds in future years:

	2020	2021	2022	2023	2024	2025	2026	2027	2028	2029
NGRB's estimated funding allocation as advised by the department	314,526	323,962	333,680	343,692	354,002	364,622	375,560	386,828	398,432	410,386

The Direct Measure of Income capacity to contribute score will not be used to determine the recurrent funding capacity to contribute for the four eligible schools until 2022. As they will therefore not need transition assistance in 2020 and 2021, the direct distribution of funds to those schools will be deferred and distributed in equal annual amounts from 2022 to 2029.

Deferred expenditure profile	0	0	459,102	459,102	459,102	459,102	459,102	459,102	459,102	459,102
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Similarly, the general assistance expenditure to other schools will be deferred and distributed in equal annual amounts from 2022 to 2029 as follows:

Deferred expenditure profile	0	0	40,000	40,000	40,000	40,000	40,000	40,000	40,000	40,000
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Interest earned

	2020 \$
Interest earned	116.00

Activity Report

Summary of outcomes

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 agreement/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
Project 1: Special circumstances funding The Choice and Affordability Fund will support schools and students impacted by special circumstances or in priority areas such as rural, regional and remote locations and areas affected by drought or other natural disasters.	The address the financial and economic impacts of COVID-19, short term emergency assistance was made available to all Tasmanian independent schools in need. As a contingency, \$100,000 was set aside in 2020 to provide assistance for schools in situations that were: Unexpected - Could not have been reasonably foreseen. Causing severe financial difficulty - Where a school faced a real prospect of having to cease a large part of its educational activities or significantly lower its educational services. Short term - Schools should be able to overcome their financial difficulty and resume operations and had to be able to provide a five-year business and recovery plan. a special need - Schools have exhausted all other options to remedy the financial situation of the school.	Centralised \$1,250	Centralised \$1,250	Expected Outcome: Any required school assisted would have been able to overcome its financial difficulty and resume viable operations Indicators of Success: <ul style="list-style-type: none"> All Tasmanian Independent Schools remained open Schools requiring funding would be able to provide a five-year business and recovery plan Tasmanian Schools Registration Board could confirm that every independent school in Tasmania has met the financial registration standard Final Outcome: As the funds set aside for special circumstances funding in 2020 were not required, they will be kept for future special circumstances funding or transferred to other priorities in a future work plan.
		Distributed \$100,000	Distributed \$ NIL	
		2020 \$100,000 (Direct funding to schools) Administration 2020 25% \$1,250 PD/Travel/Oversight 2020 25% \$5,000 Total Choice and Affordability Funding \$106,250	Administration 2020 25% \$1,250 Total Choice and Affordability Funding: \$1,250	

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Project 2: Strengthening outcomes for schools and educationally disadvantaged schools and students Relevant national/local priority: Through the Choice and Affordability Fund, IST will support initiatives that strengthen outcomes for schools such as helping underperforming schools improve outcomes, including through school industry partnerships, and supporting educationally disadvantaged schools and students .	The entirety of Tasmania is identified as a regional zone with students from educationally disadvantaged backgrounds presenting in schools across all areas of the state. As such, our independent schools are located across a vast area, often operating within quite isolated contexts. In 2020, IST instigated a process to establish a new Education Consultancy role and sought to appoint this Consultant to work alongside schools to support them across all aspects of academic development. Initiatives undertaken in 2020 for this project included: 1. Scoping of new role 2. Tasmanian employment market analysis 3. Creation of role description, business plan, KPI's 4. Advertising of role 5. Interviewing all applicants 6. Reference checks 7. Employment contract creating 8. Induction planning for new role commencing in January 2021.	Centralised \$49,984	Centralised \$5,419	Outcome: A new IST Curriculum Consultant was appointed in December 2020. Indicators of success: The suitable appointment (as identified in the role description) of a full- time IST Curriculum Consultant was delayed from September 2020 to December, due to delays in the roll-out of the CAF. All role descriptions, employment contracts and induction training preparation was completed in readiness for the new appointee commencing in January, 2021.
		Distributed \$	Distributed \$NIL	
		Appointment of Curriculum Consultant (1.0 FTE) plus oncosts 2020 25% - \$32,065 Senior Education Consultant - 10% of salary + oncosts 2020 25% - \$4,169 Resources, Professional Learning & Travel 2020 25% - \$12,500 Admin support 2020 25% - \$1,250 Total Choice and Affordability Funding: \$49,984	Senior Education Consultant - 10% of salary + oncosts 2020 25% - \$4,169 Admin support 2020 25% - \$1,250 Total Choice and Affordability Funding: \$ 5,419	

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<i>Project 3: Student wellbeing and support</i> Relevant national/local priority: Student wellbeing is essential for both academic and social development. Through the Choice and Affordability Fund, IST will support schools that require additional assistance to establish safe, supportive and respectful learning environments.	In an attempt to enhance student wellbeing and support across Tasmanian Independent Schools, IST successfully appointed a full-time Inclusive Education Consultant to work across the state. This new role was advertised, and an role description and a business plan was developed.	Centralised \$49,985	Centralised \$5,420	Outcome: A new IST Inclusive Education Consultant was appointed in December 2020. Indicators of success: The suitable appointment (as identified in the role description) of a full- time IST Curriculum Consultant was delayed from September 2020 to December, due to delays in the roll-out of the CAF. All role descriptions, employment contracts and induction training preparation were completed in readiness for the new appointee commencing in January, 2021.
		Distributed \$	Distributed \$NIL	
		Appointment of Inclusive Education Consultant (1.0 FTE) plus oncosts 2020 25% - \$32,065 Senior Education Consultant - 10% of salary + oncosts 2020 25% - \$4,170 2021 Resources, Professional Learning & Travel 2020 25% - \$12,500 Admin support 2020 25% - \$1,250 Total Choice and Affordability Funding: \$49,985	Senior Education Consultant - 10% of salary + oncosts 2020 25% - \$4,170 Admin support 2020 25% - \$1,250 Total Choice and Affordability Funding: \$5,420	

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<p><i>Project 4: Regional Transition assistance</i></p> <p>Relevant national/local priority: The Choice and Affordability Fund incorporates the National Adjustment Assistance Fund. The Choice and Affordability Fund will also provide support for schools in general to transition to a new capacity to contribute model for recurrent funding.</p>	<p>There are no Tasmanian independent schools that would have met the criteria to have access to support through the National Adjustment Assistance Fund.</p> <p>The Choice and Affordability Fund will provide compulsory regional assistance for four eligible schools during their transition to the Direct Measure of Income for capacity to contribute during 2022 to 2029.</p> <p>The Choice and Affordability Fund will also provide support for schools in general to transition to a new capacity to contribute model for recurrent funding although it is anticipated that very few other Tasmanian independent schools will need that support.</p> <p>As no support is planned for 2020 or 2021, transition assistance expenditure has been deferred to 2022-2029.</p>	<p>2020 NIL</p> <p>TOTAL NIL (Direct funding to schools)</p> <p>Administration</p> <p>2020 25% \$1,250</p> <p>PD/Travel/Oversight 2020 25% \$5,000</p> <p>Total Choice and Affordability Funding: \$6,250</p>	<p>2020 NIL</p> <p>TOTAL NIL (Direct funding to schools)</p> <p>Administration</p> <p>2020 25% \$1,250</p> <p>Total Choice and Affordability Funding: \$1,250</p>	<p>Outcome and Indicators of Success:</p> <ul style="list-style-type: none"> School provides a business plan for 2022-2031 to meet expected outcomes School provides a ten-year financial plan for 2022-2031 showing expected outcomes School provides annual financial report for each year from 2022 to 2029 as evidence of achievement of planned progress
Administrative costs ⁴		\$5,000	\$5,000	* Total is the sum of project allocations of 1,250 to the 4 projects.
TOTAL		\$212,469	\$13,339	