



Public Annual Report Requirements

May 2026

Your Public Annual Report is a key accountability document.

It explains how your charter school has performed during the year, the progress made towards its goals, and how resources have been managed.

The report gives families, authorisers, and the wider community a clear view of the school's achievements, challenges and progress towards its goals.

Your Public Annual Report must show performance against agreed annual goals and performance plan targets, including key outcomes such as student attendance, student achievement, financial performance, and compliance with regulatory requirements.

Sponsors must publish a Public Annual Report by 31 May.

How to use this document

This document has been developed to outline the mandatory reporting requirements for sponsors.

It does not replace any information specified in the Performance Plan and is not compulsory to use.

Sponsors may choose how to structure their reports, provided all requirements are met.

Publication

The following information regarding the Public Annual Report is specified in the Performance Plan:

Part B:3(a)

The Sponsor must: publish its public annual report on the Charter School website (or if that is not possible, in a regional newspaper circulating in the location of the Charter School)

For the avoidance of doubt, the website the plan refers to is your school's website.

Part B:4 Report Requirements for the Performance Targets and Performance Outcomes Measures

D. Public Annual Report

Sponsor must report on all Performance Measures set out in this Performance Plan- i.e., Student Outcomes (including Student achievement and attendance), Financial Performance and SMC requirements

Student attendance

Need to address

- Progress towards achieving standardised target of 80% Regular Attendance
- Meeting the Performance Plan specific minimum attendance performance thresholds

Each charter school is expected to show progression over time and work towards the target of 80% regular attendance across the year.

Schools should clearly show improvement for all attendance categories:

- Regular attendance
- Irregular absence
- Moderate absence
- Chronic absence

Note: You must use the verified attendance data from the Ministry of Education Every Day Matters reports.

Student achievement

Years 1-2 Need to address

- Provide an overview of student progress in literacy and numeracy

Provide a general overview of student learning and how you know they are progressing.

Years 3-10 Need to address

- Progress towards achieving standardised target of 80% of all students at or above expected curriculum level for Reading, Writing and Mathematics
- Meeting the Performance Plan specific minimum achievement performance thresholds using the stated assessment tools

Each charter school with Year 3-10 students is expected to show progression over time and work towards the standardised target.

Years 11 -13 Need to address

- Progress towards achieving standardised target of 95% of school leavers attaining NCEA Level 2 (or equivalent)
- Meeting the Performance Plan specific minimum achievement performance threshold for school leavers attaining NCEA Level 2 (or equivalent)

Each charter school with Year 11-13 students is expected to show progression over time and work towards the standardised target.

Points to cover in attendance and achievement analysis

Covering the following points will ensure sufficient detail is included to meet the reporting requirements of your Performance Plan.

Summarise data and identify trends – Present the data clearly, highlight any points of interest and identify key trends.

Equity - Identify and comment on variations by year level, gender and ethnicity.

Progress and performance against targets - Assess the data outcomes against the expected standardised targets (including progress towards them) and the minimum performance thresholds.

Key drivers and responses – Outline the main factors impacting performance and the effectiveness of strategies that have been implemented. Commenting on the specific school context and other factors may be useful.

Next steps for improvement - Identify priority actions to strengthen future outcomes particularly for students at risk of underperformance.

Financial performance

Need to address

Reporting against the standardised financial performance targets:

- Operating surplus 2-5%
- Working capital ratio 2:1
- Debt/equity ratio 0.5:1
- Operating cash: +ve = actual
- Enrolment variance: contextual measure stating growing or stable or decreasing

Provide audited financial statements for the previous financial year, prepared in line with generally accepted accounting practices.

Useful approach for reporting on each financial performance target

- Comparison of actual result to target
- Discussion and reasons for difference
- Other relevant financial information useful for interpretation
- Future financial goals

For reporting Enrolment variance, a more in-depth discussion may be necessary, including a comment on the school context and student characteristics.

Regulatory compliance

Need to address

Reporting standard minimum compliance has been met for the following areas:

- Employment of certificated teachers and LATs
- Reporting requirements
- Student enrolment requirements
- Insurance
- School day/hours and term date requirements
- Transport provision requirements (if applicable)
- Property

Provide a statement explaining whether or not you have met each of the standard minimum compliance requirements.