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**Choice and Affordability Fund**

***Annual Report 2022***

**Association of Independent Schools of the ACT Inc**

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## Summary of 2022

The activities proposed under the Choice and Affordability Fund are necessary to, and complimentary of, support for ACT Independent schools addressing the national priorities. The 2022 work plan was developed in consultation with the AISACT Executive Committee and communicated to all Member schools. Following extensive deliberation and consultation, the AISACT Executive Committee determined the parameters by which the funding would be distributed to schools across the National Priorities.

Projects and activities include both distributed funds provided directly to schools and centralised programs designed to best support schools. Under NP(a), *Choice and Affordability of schools*, grant funding was offered to all schools in support of their work in facilitating parental choice of schools in the independent sector in the ACT. *Transition Assistance* (NP(b)) priority funds were targeted to those schools that are negatively impacted by the shift to the Direct Measure of Income (DMI), as well as support for schools in general to transition to the new funding model.

Distributed funds were available to schools through specific grant programs under *the Strengthening Outcomes for Schools and Educationally Disadvantaged Schools and Students* (NP(d)), and *Student Wellbeing and Support* (NP(e)) priorities. Targeted Professional Learning opportunities was also offered to support the schools address these priorities.

*Special Circumstance Funding* (NP(c)) was available through direct grants for all schools who apply and meet the specific criteria to address unforeseen events and short-term emergency assistance.

## Financial Report

### 2022 Budgeted Funding and Actual Expenditure

Expenditure for 2022 by activity is outlined in the table below. Expenditure for 2022 by school is outlined in *Attachment A – CAF 2022 School Level Data Report*.

Activities/Initiatives	Expenditure type	Budgeted for 2022 <sup>1</sup>	Actual Spend in 2022 <sup>2</sup>
<b>A – Choice and Affordability</b>			
<i>Facilitating Parental Choice</i>	Centralised		
	Distributed	\$131,547	\$131,547
	Centralised		
	Distributed		
<b>Total for Priority A (only required if more than one activity for the priority)</b>	<b>Centralised</b>		
	<b>Distributed</b>		
<b>B – Transition Assistance<sup>3</sup></b>			
<i>Negative Growth Assistance</i>	Centralised		
	Distributed	\$70,158	\$70,158
<i>Transition Assistance</i>	Centralised		
	Distributed	\$70,158	\$70,158
<b>Total for Priority B (only required if more than one activity for the priority)</b>	<b>Centralised</b>		
	<b>Distributed</b>	<b>\$140,316</b>	<b>\$140,316</b>
<b>C – Special Circumstances Funding</b>			
<i>Special Circumstances Fund</i>	Centralised		
	Distributed		
	Centralised		
	Distributed		
<b>Total for Priority C (As a contingency, funds available in the year if assistance for schools as required)</b>	<b>Centralised</b>		
	<b>Distributed</b>		
<b>D – Strengthening outcomes for schools and educationally disadvantaged schools and students</b>			
<i>Strengthening School Outcomes Grants</i>	Centralised		
	Distributed	\$100,000	\$100,00
<i>Strengthening School Outcomes Professional Learning</i>	Centralised	\$53,472	\$0
	Distributed		
<b>Total for Priority D (only required if more than one activity for the priority)</b>	<b>Centralised</b>	<b>\$100,000</b>	
	<b>Distributed</b>	<b>\$53,472</b>	
<b>E – Student wellbeing and support</b>			
<i>Supporting Students Grants</i>	Centralised		
	Distributed	\$75,000	\$45,000
<i>Supporting Students Professional Learning</i>	Centralised	\$56,547	\$0
	Distributed	\$XXX	\$XXX

<sup>1</sup> This must reflect the Agreement or 2022-2025 Work Plan.

<sup>2</sup> If there is a variation from that planned, a concise explanation must be provided in the Activity Report section. Please note, only minor variations should be reported in this section. Under paragraph 53 of CAF Guidelines, the NGRB will be assessed on the consistency of the annual report to with the Agreement / Work Plan. Substantial variations must be agreed with the Department through revisions to the Agreement / Work Plan. Substantial variations cannot be agreed retrospectively.

<sup>3</sup> Transition assistance for regional schools must be separately identified as an activity. Transition assistance for schools that would have been eligible for the National Adjustment Assistance Fund must be separately identified as an activity.

Activities/Initiatives	Expenditure type	Budgeted for 2022 <sup>1</sup>	Actual Spend in 2022 <sup>2</sup>
<b>Total for Priority E (only required if more than one activity for the priority)</b>	Centralised	\$75,000	\$XXX
	Distributed	\$56,547	\$XXX
	Administrative costs <sup>4</sup>	\$8,770	\$8,770
	<b>Total expenditure<sup>5</sup></b>	\$565,652	\$425,633 <sup>6</sup>
	Deferred funding	\$595,545	\$12,857

### Interest earned that is being carried forward to 2023

Interest earned but not spent since last annual report <sup>7</sup>	\$4657.16
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### Schools' Use of Distributed CAF Funding

AISACT has distributed funds directly to school as indicated above and has received from each school confirmation that the funds have been used for the purposes it was provided through an annual statement.

<sup>4</sup> The NGRB's administrative costs directly associated with implementing the activities. These should not exceed two per cent of total funding over 2020 to 2029. In limited circumstances an NGRB may apply in writing for an increase in allowance.

<sup>5</sup> Sum of centralised, distributed, and administrative expenditure

<sup>6</sup> The amount recorded in this cell should match the NGRB Acquittal Certificate of funding spent in 2022

<sup>7</sup> This should include all interest earned to 31 December 2022 that is being carried forward into 2023. Please also include any interest earned in 2020-21 that was not reported in the last CAF annual report which is also being carried forward into 2023.

## Expenditure Profile for 2022–2029

This table reflects the NGRB’s planned expenditure over 2023 to 2029 consistent with its CAF Agreement and, where applicable, its CAF Work Plan, with any variations outlined below.

	2023	2024	2025	2026*	2027*	2028*	2029*
NGRB’s total estimated funding allocation as advised by the department	\$455,966	\$467,452	\$481,476	\$495,920	\$510,798	\$526,121	\$541,905
NGRB’s estimated Regional Transition Assistance funding allocation as advised by the department	NA	NA	NA	NA	NA	NA	NA
Accrued deferred funding from 2020, 2021 and 2022, to be carried forward to 2023 <sup>8</sup>	\$843,081						
Accrued interest earned on funds held in 2020, 2021 and 2022, to be carried forward to 2023 <sup>9</sup>	\$6,312						
NGRB’s planned expenditure for the relevant year <sup>10</sup>	\$554,138	\$595,769	\$604,703	\$613,903	\$623,381	\$633,142	\$743,196
NGRB’s planned regional transition assistance expenditure for the relevant year <sup>11</sup>	\$NA	\$NA	\$NA	\$NA	\$NA	\$NA	\$NA
NGRB’s planned deferred funding for the relevant year to be spent in a future year <sup>12</sup>	\$0	\$0	\$0	\$0	\$0	\$0	
Accrued deferred funding from the relevant year and previous years to be spent in a future year <sup>13</sup>	\$744,908	\$616,591	\$493,365	\$375,381	\$262,798	\$155,777	

[\*NGRBs with Work Plans can include the following note: Funding over 2026 to 2029 is indicative and will finalised through 2026-2029 Work Plan to be settled in 2025.]

<sup>8</sup> Please note this is the amount paid by the Department in 2020, 2021 and 2022, that will be carried forward into 2023. The amount in this row should be attributed as expenditure in a future year(s) in the NGRB’s planned expenditure for the relevant year (the row containing footnote 11).

<sup>9</sup> Please note this is *actual* interest earned that will be carried forward into 2023, where the NGRB’s Acquittal Certificate is not addressing the amount (see previous page and information under the heading about interest earned). The amount in this row should be attributed as expenditure in a future year(s) in the NGRB’s planned expenditure for the relevant year, in the row below. If no interest is being brought forward in to 2023, please indicate N/A.

<sup>10</sup> Please note this row should include all CAF funding (except amounts spent in 2020, 2021 and 2022) and where applicable, actual interest earned on funds held which is being brought forward in to 2023.

<sup>11</sup> Please note this row is used to monitor the rate of expenditure to ensure agreed proportions of investment are met.

<sup>12</sup> Please note this is any amount of CAF funding to be paid by the Department for the relevant year that is not spent in the relevant year. This row should include deferred CAF funding from the amount paid by the Department and, where applicable, for 2023 may include actual interest earned on funds held in 2020, 2021 and 2022 being carried forward into to 2023. For example, an NGRB may plan to defer \$5 million in 2023 and defer another \$5 million in 2024, with the resulting \$10 million to be spent in 2025. This row would show \$5 million in deferred expenditure in 2023, \$5 million deferred in 2024 and then \$0 in 2025.

<sup>13</sup> Please note this is the total amount carried forward to the next year or any subsequent year and will show the *cumulative deferred expenditure* from the relevant year and/or previous years that has not yet been spent. This row should include deferred CAF funding from amounts paid by the Department and, where applicable, actual interest earned on funds held in 2020, 2021 and 2022, being brought forward in to 2023. Continuing the example in the previous footnote, where an NGRB may plan to defer \$5 million in 2023 and defer another \$5 million in 2024, with the resulting \$10 million to be spent in 2025, this row would show \$5 million in accrued expenditure in 2023, \$10 million in 2024 and then \$0 in 2025.



## Activity Report

<b>Activity/Initiative</b>	<b>Facilitating Parental Choice</b>
Priority	A – Choice and Affordability

### Activity Description

AISACT distributed funds under this priority for every Member school. This priority provided funding for initiatives that facilitate parental choice and opportunity giving parents the ability to choose an affordable school that suits their child. The allocation each year to schools was based on a school's enrolments and DMI. The allocation amount calculated is based on a formula agreed by all Members. Schools received correspondence outlining the predicted funding amount they could expect in the years 2022-2025. Schools were required to indicate how the allocated funds will contribute to the school's plans under this priority. Schools provided a clear statement which captures how they will promote the school as a choice for parents. Forward planning is assisted through the early identification of the proposed funding levels.

### Outcomes Achieved

Outcomes	Indicators of success
Increased affordability of participating schools through planned use of the funds. Increased awareness of the suitability of a school by potential families.	All participating schools (sixteen schools) through an annual report demonstrated practical measures to promote affordability and parental choice.

### Risk Management

Risk	How the risk will be managed
Schools not acquitting the funds for the purpose for which they are intended.	Schools will be required to provide an annual statement of intent for the use of funds. The Choice and Affordability agreement and National Priorities will be a standing item on AISACT General Meetings (all Member schools attend, four times per year)

<b>Activity/Initiative</b>	<b>Negative Growth Assistance</b>
Priority	B – Transition Assistance

### Activity Description

Financial and transition support will be provided to the school which would meet the criteria to have access to support through the National Adjustment Assistance Fund (NAAF); that is, schools which will experience reductions in per student funding. Eligible schools One AISACT Member school is captured under this criterion. This school will receive direct grants each year.

## Outcomes Achieved

Outcomes	Indicators of success
Assist eligible school in transitioning to the new funding model.	The school reports on how the funding contributed to their transition plan.

## Risk Management

Risk	How the risk will be managed
The school is unable to identify precisely how the direct grant was able to assist in transition to the new funding model.	AISACT will maintain regular contact with the school specific to the outcomes of this priority

<b>Activity/Initiative</b> Priority	<b>Transition Assistance</b> B - Transition Assistance
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## Activity Description

Financial and transition support will be provided to those schools which would meet the criteria determined by the AISACT Executive Committee. The AISACT Executive Committee determined that schools with an annual indexation rate below two per cent as indicated in the Commonwealth funding model (irrespective of enrolments) would be eligible to receive a direct grant under this Priority. Two Member schools are eligible for funding under the criteria determined by the Executive Committee: Burgmann Anglican School and Daramalan College.

Outcomes	Indicators of success
Assist eligible schools in transitioning to the new funding model.	The schools note on how the funding contributed to their transition planning through an annual statement.

## Risk Management

Risk	How the risk will be managed
The schools are unable to identify precisely how the direct grant was able to assist in transition to the new funding model.	AISACT will maintain regular contact with the schools specific to the outcomes of this Priority.



<b>Activity/Initiative</b>	<b>Special Circumstance funding</b> Priority C - Special Circumstances Funding
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**Activity Description**

The Choice and Affordability Fund is available for schools to apply for assistance if they are impacted by a special circumstance, as outlined in the Guidelines, for short term assistance. The nature of support to a school experiencing special circumstances will vary by the type of circumstance. As a contingency, \$100,000 will be available each year to provide assistance if required. In 2022 AISACT received no requests for this funding.

Outcomes	Indicators of success
Any school assisted will be able to address the impact of the identified issue	Schools which access this funding are able to continue operating with little interruption.

**Risk Management**

Risk	How the risk will be managed
Schools do not apply to access the available fund. Allocated funds are never accessed	AISACT will maintain regular correspondence with schools to inform them of the fund. Further, AISACT will make direct contact with schools should there be a circumstance in which the school may be eligible to apply. AISACT will re-direct funds over time to other Priorities as needed

<b>Activity/Initiative</b>	<b>Strengthening School Outcomes - Grants</b>
Priority	D – Strengthening outcomes for schools and educationally disadvantaged schools and students

**Activity Description**

This grant will support initiatives that strengthen outcomes for schools. Member schools will be able to apply for grants of \$20,000. There will be up to five grants available per year. These direct grants will support programs/projects/initiatives/resources specific to a school which supports the focus of this Priority. Over the time of this workplan, it is anticipated that all Member schools would benefit from these direct grants.

Outcomes	Indicators of success
Schools will deliver programs/projects/initiatives/resources bespoke to their needs and articulated in their application which support strengthening outcomes for students.	AISACT provides five grants each year. The schools report on how this grant contributed to meeting the stated outcome. School Names  In 2022, recipient schools made presentations on their initiative at the AISACT Annual Celebrating Teaching & Learning event.

**Risk Management**

Risk	How the risk will be managed
Schools do not apply for the grants. More applications than available grants received each year.	AISACT will maintain regular contact with the schools promoting the availability of the grants and the specific outcomes of this Priority. AISACT will meet with individual schools to propose future implementation timelines

<b>Activity/Initiative</b>  Priority	<b>Strengthening School Outcomes – Professional Learning</b> Priority D Strengthening School Outcomes – Professional Learning
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**Activity Description**

Due to the continuation of the Reform Support Fund AISACT did not need to provide the additional professional learning as forecast and therefore the funds will be roll over to support programs in following years.

Outcomes	Indicators of success
Teachers will develop deeper understanding of the contemporary skills and practices applicable to each focus area	Staff from 80% of Member schools participate in the suite of programs. Teachers will make presentations on their learnings and implementation at the AISACT Annual Celebrating Teaching & Learning event.

**Risk Management**

Risk	How the risk will be managed
Participation numbers low.	AISACT will maintain regular contact through all established networks promoting the availability of the professional learning opportunities and the specific outcomes of this Priority. AISACT will make contact with individual schools and individuals to encourage engagement

<b>Activity/Initiative</b>	<b>Supporting Students - Grants</b>
Priority	E Student wellbeing and support

**Activity Description**

These grants will support initiatives that strengthen outcomes for schools. Member schools will be able to apply for grants of \$15,000. There will be up to five grants available per year. These direct grants will support programs/projects/initiatives/resources specific to a school which supports the focus of this Priority. Over the time of this workplan, it is anticipated that all Member schools would benefit from these direct grants. During 2022 only three of the available grants were provided and the left-over funds will be made available in 2023.

Outcomes	Indicators of success
Schools will deliver programs/projects/initiatives/resources bespoke to their needs and articulated in their application which support student wellbeing and ensure safe, supportive and respectful learning environments.	<p>AISACT provides five grants each year.</p> <p>School Names</p> <p>The recipient schools reported on how this grant contributed to meeting the stated outcome.</p> <p>Schools made presentations on their initiative at the AISACT Annual Celebrating Teaching &amp; Learning event</p>

**Risk Management**

Risk	How the risk will be managed
Schools do not apply for the grants. More applications than available grants received each year.	AISACT will maintain regular contact with the schools promoting the availability of the grants and the specific outcomes of this Priority. AISACT will meet with individual schools to propose future implementation timelines

<b>Activity/Initiative</b>	<b>Strengthening School Outcomes – Professional Learning</b>
Priority	Priority D Strengthening School Outcomes – Professional Learning

**Activity Description**

Due to the continuation of the Reform Support Fund AISACT did not need to provide the additional professional learning as forecast and therefore the funds will be roll over to support programs in following years.

Outcomes	Indicators of success
Teachers will develop deeper understanding of the contemporary skills and practices applicable to each focus area	Staff from 80% of Member schools participate in the suite of programs. Teachers will make presentations on their learnings and implementation at the AISACT Annual Celebrating Teaching & Learning event.

## Risk Management

Risk	How the risk will be managed
Participation numbers low.	AISACT will maintain regular contact through all established networks promoting the availability of the professional learning opportunities and the specific outcomes of this Priority. AISACT will make contact with individual schools and individuals to encourage engagement

## Key stakeholders

Stakeholder	Engagement Work
<b>Stakeholder name</b> Blue Gum Community School Brindabella Christian College Burgmann Anglican School Canberra Christian School Canberra Girls Grammar School Canberra Grammar School Canberra Montessori School Covenant Christian School Daramalan College Emmaus Christian School Galilee School Communities @ Work Islamic School of Canberra Orana Steiner School Radford College St Edmund's College Taqwa School Trinity Christian School	Member schools are kept informed and consulted about the CAF Priorities and opportunities for funding through a variety of means: <ul style="list-style-type: none"><li>• Standing item at AISACT Executive Committee meetings (x7)</li><li>• Standing item at quarterly Member General meetings</li><li>• Standing item at Finance Risk and Audit Subcommittee meetings (x7)</li></ul> Further information is provided through direct emails, Circulars, newsletters etc

## Variations from Agreement / Work Plan

As indicated above the professional learning planned did not progress due to the activities, and support provided through initiatives in the Reform Support Fund workplan. The funds will be rolled over and attributed to future years professional learning and supports provided.

**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<sup>14</sup>:**



**Date:**

Andrew Wrigley  
Executive Director  
Association of Independent Schools ACT

Date: 19/5/2023

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<sup>14</sup> Name and position of the person within the NGRB with authority to sign off.