**Teacher Self-Review Tool**

This self-review tool is part of a comprehensive PLD programme to help you become more confident to teach financial capability. It is designed to support individual teachers who want to use the **Sorted in Schools, Te whai hua – kia ora!** Years 9-10 resources as part of this process.

You can take multiple approaches and [pathways](https://sortedinschools.org.nz/teachers/teacher-pathways/) to teach financial capability. Schools determine an approach that is the best fit for their context, shaped by the needs of the students, teachers, whānau, and the wider school community. This is reflected in the school curriculum which localises content and prioritises learning needs.

## Supporting you on your journey

This professional development model supports teachers at all levels of proficiency, from being a novice (new to teaching financial capability) to becoming an expert practitioner. A poutama articulates the phases you will work through as you embrace new learning to teach financial capability in the classroom.

The different levels of teacher capability are identified in the table below.

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| POUTAMA PHASES | PARTICIPANTS WILL: |
| **Superuser** | design financial capability learning programmes with students and communities that are relevant and have meaningful context. They will be engaged in ongoing learning and development and will be working towards leading the learning of others. |
| **Proficiency** | confidently integrate financial capability into their learning context in meaningful and authentic ways. They will create new content and share their learning with others. |
| **Readiness** | begin to integrate financial capability into learning programmes by trialing new practices and exploring new opportunities. |
| **Awareness** | have some knowledge of financial capability and explore how this might be integrated into learning programmes. |
| **Unaware** | have little to no knowledge or understanding of financial capability. |

\*The poutama is underpinned by tested research and the [Concerns Based Adoption Model](https://www.air.org/resource/concerns-based-adoption-model-cbam)

## How to use the self-review tool

Use this tool as a guide to identify where you are, what you are doing and what your next steps might be.

You can be at varying phases of the self-review tool. You might be working at the unaware phase on one aspect of the poutama and working towards the superuser phase on another. It will be very different for everyone, however, regardless of the phase you have achieved, we encourage you to reflect on your outcomes and evaluate how to improve.

***Tip:*** *Highlight and date where you are on the poutama at the beginning of the process.*

It can be useful to monitor your progress if you are using financial capability as a context for teacher inquiry. This resource allows you to reflect on practice and to take measured and supported steps to achieve the poutama outcomes. You can opt to include added information at each level by hyperlinking evidence which might include:

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| * PLD participation
* staff or curriculum meetings
* planning snapshots
* school documentation
* student conferences
 | * surveys
* student data
* student voice
* incidental moments of teaching
* links to community expertise.
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Evidence can include student outcomes too and the [assessment guide](https://sortedinschools.org.nz/teachers/teacher-tools/assessment-guide/) has some other ideas about what might be included.

As a tool for professional learning development, it’s important you work at your own pace as the process is a very individual one. By working across the phases, you can easily identify what support you might need to progress further. By adding evidence, you can monitor your baseline data to show meaningful shifts over time.

While this tool is designed to support you to implement financial capability into your classroom programme, it can be adjusted to create a useful schoolwide tool for school management and PLD leaders.

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| **POUTAMA STEPS:** | **Unaware** | **Aware** | **Ready** | **Proficient** | **Superuser** |
| PROFESSIONAL LEARNING DEVELOPMENT |
| **Professional learning model used within school**  | I have not yet explored how to integrate financial capability into the existing school model of professional learning. | I have investigated how to integrate financial capability into the existing school model of professional learning and explored options through discussion with curriculum leaders / HOLA’s. | I have trialled aspects of financial capability in my learning area or ako whānau time within the framework of the existing school professional learning model. I have responded to student feedback to gauge strengths and weaknesses. | I have worked collaboratively with colleagues in other curriculum learning areas to connect financial capability through the school’s professional learning model.  | I have led schoolwide professional development onhow to embed financial capability into the existing school professional learning model.  |
| **Seeking opportunities for professional learning development for financial capability** | I have not been actively looking for professional learning development opportunities relating to financial capability. | I have identified a range of professional learning development available for financial capability. | I have engaged in some form of formal professional learning development for financial capability. | I have provided evidence that I integrated my new financial capability learning into my teaching practice as a direct outcome of my professional learning development.  | I have led professional learning development for financial capability and have been active on a wider platform sharing my experiences and initiating discussions to support others.  |

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| TEACHING AND LEARNING PRACTICE |
| [**Financial**](https://nzcurriculum.tki.org.nz/Curriculum-resources/Financial-capability/Financial-capability-progressions)[**capability**](https://nzcurriculum.tki.org.nz/Curriculum-resources/Financial-capability/Financial-capability-progressions)[**progressions**](https://nzcurriculum.tki.org.nz/Curriculum-resources/Financial-capability/Financial-capability-progressions) | I am not aware of the financial capability progressions or how they can guide classroom practice in my learning area for content or concepts. | I have investigated the financial capability progressions but have not implemented them into my learning area. | I have integrated aspects of the financial capability progressions into my learning area and I am exploring further opportunities. | I have shared the financial capability progressions with colleagues and assisted them with implementation ideas.  | I have initiated co-constructing the financial progressions to best fit the needs of our students, teachers, whānau and the wider community, involving stakeholders in this process.  |
| **Planning across curriculum learning areas** | I have not initiated planning across curriculum learning areas other than my own. | I have discussed with another teacher how we could plan learning experiences around financial capability in more than one curriculum learning area. | I have trialled with another teacher a cross-curricular approach to teaching financial capability and have looked at the strengths and weaknesses of this trial. | I have co-constructed a cross-curricular teaching plan with other teachers and have integrated financial capability across other learning areas. | I have shared cross-curricular planning integrating financial capability and have been active on a wider platform sharing my experiences and initiating discussions to support others with planning.   |
| **Student achievement and** [**assessment**](https://sortedinschools.org.nz/teachers/teacher-tools/assessment-guide/)  | I have not used the formative assessment rubrics to assess student achievement using financial capability as the context either through theme or in my learning area. | I have investigated using the formative assessment rubrics to assess student achievement using financial capability as the context either through theme or in my learning area. | I have trialled an aspect of financial capability and students have used the formative assessment rubrics to measure their achievement using financial capability as the context either through theme or in my learning area. | I have used formative assessment rubrics in my teaching practice to measure student achievement using financial capability as the context either through theme or my learning area. | I have initiated students to be actively involved in the process of measuring their own achievement by using the formative assessment rubrics using financial capability as the context through theme or in my learning area. |
| **Student involvement in financial decision making** [Trips, equipment, camps, events, purchasing, leadership, shopping fundraising, etc.] | I have not involved my students in financial decision making in my learning area. | I have identified with my students the financial decisions that they might be involved in within my learning area. | I have involved my students in an authentic financial context within my learning area and they used their skills to manage and monitor the financial decisions they were involved in. | I have initiated and encouraged authentic financial capability learning experiences for students in a wider school setting.    | I have initiated and encouraged authentic financial capability learning experiences for students beyond the school setting.   |
| **Celebrating the champions** [The young New Zealand leaders and role models who are leading wealthy lives]  | I have not yet celebrated the achievements of any financial champions with the students. | I have identified with students the financial champions that they would like to meet and interview about their pathways to success.  | I have facilitated theintroduction of a financial champion to students and discussed with them the key lessons that were shared. | I have included key ideas of the financial champion into my programme and I am connecting students with mentors to support their financial capability learning. | I have created a financial champions database that I am sharing with other colleagues in school.I have shared this resource on a wider platform with colleagues outside the school.  |

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| PRACTICE BEYOND THE CLASSROOM |
| **Connecting with whānau**  | I have not yet engaged with whānau with key ideas of financial capability that will support student learning.  | I have identified steps to engage whānau with key ideas of financial capability that will support student learning.  | I have trialled steps to engage whānau around key ideas of financial capability that will support student learning.I am responding to feedback from whānau about the financial capability skills, behaviours and attitudes they believe students need to lead a wealthy life. | To gain relevant insights, values and perspectives, I have involved whānau in implementing their ideas about financial capability to support student learning.  | I have facilitated whānau partnerships to actively initiate and engage with students to support them with ideas about financial capability and wellbeing. |
| **Engaging with wider community**  | I have not yet engaged with the wider community to explore key ideas of financial capability that will support student learning.  | I have identified steps to engage with the wider community to explore key ideas of financial capability that will support student learning. | I have trialled steps to engage with the wider community to explore key ideas of financial capability to support student learning.I have responded to feedback from the community about financial capability and the skills, behaviours and attitudes they believe students need to lead a wealthy life. | I have included the ideas of the wider community to support student learning to gain relevant insights, values and perspectives.I have involved the wider community in the delivery of these ideas. | I have facilitated wider community partnerships/ mentoring support to actively initiate and engage with students to support them with ideas relating to financial capability and wellbeing. |

References:

* The [Concerns Based Adoption Model.](https://www.air.org/resource/concerns-based-adoption-model-cbam)
* elearning Planning Framework. Ministry of Education. Updated version 2014, Te Toi Tupu Consortium, on behalf of the Ministry of Education.
* [Upper Harbour Sorted Schools action plan](http://nzcurriculum.tki.org.nz/Curriculum-resources/Financial-capability/Financial-capability-in-action)