

Board Task Checklist

Term 1 - 2026



Use this checklist alongside your board's workplan to complete your tasks for this term.

Task	Click on the blue links to:
At the first meeting of the year	
Appoint the Presiding Member (Board Chair). At the first board meeting of the year, your board must appoint a presiding member for the next 12 months. Appointing someone with the right skills, attitudes, and leadership qualities is key to effective board governance.	Find out more about The role of the presiding member Appointing a presiding member (board chair) Upskill in the Learning Library Leading an Effective Board
Set the date for your student representative election. Schools with students above Year 9 must set the date for this year's student representative election. While the recommended common date is 3 September 2026, it can be set for any date during this month.	Find out more about School board elections
Mid-term elections The mid-term elections will be held in 2027. A date has not yet been determined, but we'll let you know as soon as it is.	
Update your board's workplan. A well-structured workplan helps your board stay on track with its governance responsibilities. It should set out the timing for key focus areas across the year, such as strategic planning, reporting, and policy review. This forms the foundation for your monitoring and review activities and shapes the outline of your meeting agendas for the year.	View our Board workplan example
Review the Code of Conduct for Board Members. Revisiting this at the beginning of each year ensures everyone understands the minimum standards expected of them.	Find out more about Code of Conduct for Board Members
Review your board delegations. Your board can delegate specific powers and functions by passing a resolution and recording it in writing. We recommend maintaining a delegations register to document any delegations made.	Find out more about Board delegations

Review your board's conflict of interest register. Your board must manage actual, potential, and perceived conflicts of interest to protect the integrity of its decisions and uphold the reputation of its members. We recommend keeping a conflict of interest register to help you do this.	Find out more about • Conflicts of interest
Finance	
Formally approve your finance budget for 2026. Boards should review and finalise their budgets for the upcoming year as soon as possible. Once completed, your board can formally approve it and record the decision in the meeting minutes.	Find out more about • Budgeting in schools Upskill in the Learning Library • The Board's Role in Finance
Get your annual financial statements audited. Boards are required to have their annual financial statements audited every year. Your board must approve your draft annual financial statements and send them to your auditor by 31 March.	Find out more about • Annual Financial Statements
National Curriculum Changes	
Ensure your school is meeting the updated curriculum requirements. Seek an update from your principal about how these changes are being implemented in your school or kura.	Find out more about • Changes to the National Curriculum • MOE Tahurangi website
Student Attendance Changes	
Ensure your school is meeting the updated student attendance requirements. From Term 1, 2026, boards are required to have an Attendance Management Plan (AMP) in place.	Find out more about • Student attendance
Strategic Planning and Reporting	
Consider whether your current strategic plan remains fit for purpose. The Education and Training Act Amendment Act 2025 has extended the start date for the board's next strategic plan to 1 January 2027. If your current plan is fit for purpose, you can extend it to cover another year and capture any minor changes in your annual implementation plan for 2026. If it isn't and requires significant change, your board can amend it. You will, however, need to consult with your community and submit the amended plan to the Ministry of Education.	Find out more about • Strategic planning and reporting

Publish your annual implementation plan online. You must publish your annual implementation plan online and share it with your community by 31 March.	Find out more about • School planning and reporting regulations
Start preparing your annual report. You must submit your annual report to the Ministry of Education and make it available to the public by 31 May.	Find out more about • Annual report
Board as Employer	
Check in with your principal about their Professional Growth Cycle (PGC). Your principal should be engaged with their professional learning network and establish their professional development plan for 2026. Discuss this year's requirements with your principal and plan how your board can support them in successfully undertaking this mahi.	Find out more about • Professional Growth Cycle (PGC) for principals • Information from the Teaching Council on the Professional Growth Cycle for school boards
Board Policy Review	
Review your board meeting policies and procedures. Your board should have a plan to review your policies regularly. Each term, we will highlight a policy area you could focus on. For Term 1, we suggest reviewing policies and procedures related to board meetings. We recommend reading our Resource Centre articles to check your understanding before reviewing your policy.	Find out more about • Board Meetings Enrol in a live event • Board Meetings workshops and webinar
Learning and Development Opportunities	
Enrol in a workshop or webinar. • Student Suspension Meetings • Board Meetings	Enrol in a Live Event • Workshops and Webinars
Visit the Learning Library. You'll find recordings and resources from past events.	Browse the Learning Library • Learning Library Check out our latest offerings • Welcome on Board – New Members • Welcome on Board – New Members of State-Integrated Schools • Leading an Effective Board
Need something else? Contact us to discuss your needs.	Contact Us • 0800 782 435 • govadvice@tewhakaroputanga.org.nz

Housekeeping	
Check your progress. Ensure your board has completed all its tasks from the previous term.	Find out more about • Board Task Checklists • Principal Task Checklists
Check the requirements for filling any board member vacancies. Have there been any resignations since your last board meeting? When someone leaves the board, there are obligations to meet and processes to follow.	Find out more about • Elections, Vacancies & Succession Planning
Tell the Ministry of Education (and us) about any board changes using the School Board Updates form. Submit this form whenever a member joins or leaves, and when the presiding member changes. We also recommend keeping a board member register to easily confirm your board's current composition.	Find out more about • Board member register and school board updates form



Advisory and Support Centre

0800 782 435

Employment eradvice@tewhakaroputanga.org.nz

Governance govadvice@tewhakaroputanga.org.nz

Elections

0800 353 284

electionsadvise@tewhakaroputanga.org.nz

Resource Centre

resourcecentre.org.nz