

Board Task Checklist

Term 2 - 2026



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

Task	Click on the blue links to:
Strategic Planning and Reporting	
Prepare and publish your 2025 annual report. You must submit your annual report to the Ministry of Education and publish it on your school's website by 31 May.	Find out more about the Annual Report
Plan community consultation for your 2027-2029 strategic plan. Your board must have a new plan in place for this period, so it's time to start preparing your approach. Set aside time to discuss who is in your community and how you will connect and engage with them as you enter the new strategic planning cycle.	Find out more about Strategic planning and reporting
Student Representative Elections (Schools with students above Year 9)	
Appoint the Returning Officer for your September election. If using the recommended common date of 3 rd September, you must appoint your returning officer by 3 rd August. Otherwise, use our Election Planner Tool to determine your timeline.	Find out more about School Board Elections Election Planner Tool
Student Achievement	
Prepare for your mid-year student achievement review. It's good practice to review progress mid-year to check that all students are progressing as they should. Build your capability in this area by attending one of our events in June.	Find out more about Student Achievement & the National Curriculum Attend a workshop or webinar Student Achievement – What We're All Here For
Finance	
Conduct your mid-year budget review. To ensure your finances are on track, it's good practice to conduct a mid-year budget review after receiving your June year-to-date financial reports.	Find out more about Budgeting in schools Upskill in the Learning Library The Board's Role in Finance

Board Policy Review	
Review your privacy policies and procedures. Your board should have a plan to review your policies regularly. Each term, we highlight a policy area you could focus on. For Term 2, we suggest reviewing policies and procedures relating to privacy, as there have been some legislative changes, including the addition of a new privacy principle, IPP3a. We recommend reading our Resource Centre articles to check your understanding before reviewing your policy.	Find out more about • The Privacy Act and school boards
Board as Employer	
Professional Development Funding for Principal Leadership (PPCA-PPCBU) – Tranche 1	
Follow the application and approval process if your board received this tranche through your operations grant. If your principal did not choose to receive this tranche as a curriculum allowance, the tagged funding will be paid through your operations grant. You cannot pay this funding directly to your principal; your board must follow the prescribed application and approval process. Note: This funding is only available to those covered by the Primary Principals' (PPCA-PPCBU) Collective Agreement or a promulgated Individual Employment Agreement (IEA).	Find out more about • Professional Development Funding for Principal Leadership (PPCA-PPCBU)
Individual Employment Agreement (IEA) for Non-Union Principals	
Offer the latest IEA to your principal. Your principal must sign the updated promulgated IEA to receive the improved terms and conditions from recent bargaining rounds. If they have not yet been offered this, provide it as soon as possible.	Find out more about • Primary principals' individual employment agreements • Secondary principals' individual employment agreements • Area school principals' collective and individual employment agreements
Learning and Development Opportunities	
Enrol in a workshop or webinar. • Being a Good Employer – The Board's Role • Student Achievement – What We're All Here For	Enrol in a live event • Workshops and Webinars More workshops are coming soon – keep an eye out as new ones are added!
Visit the Learning Library. You'll find recordings and resources from past events.	Browse the Learning Library • Learning Library Check out our latest offerings • Student Suspension Meetings • Board Meetings

Need something else? Contact us to discuss your needs.	Contact Us • 0800 782 435 • govadvice@govhub.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

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Employment eradvice@govhub.org.nz

Governance govadvice@govhub.org.nz

Elections

0800 353 284

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Learning Events

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Resource Centre

resourcecentre.org.nz